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# FILING SYSTEMS

THEIR PRINCIPLES AND THEIR  
APPLICATION TO MODERN OFFICE  
REQUIREMENTS

BY  
EDWARD A. COPE



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## PREFACE

THE claims made in these days on behalf of rival " Filing Systems " are apt to bewilder the man who has been accustomed to use the more traditional methods of arranging and preserving business and other records. This work is an attempt to supply some trustworthy information as to the chief characteristics of modern methods, to explain the kind of assistance that they are capable of rendering to their users, and to show how they may be applied for various purposes. It is necessarily not exhaustive ; and it is not written in the interests of any one system. Its aim is to offer a few helpful hints and suggestions to those who are contemplating the adoption of modern methods.

Thanks are due to the several firms named at the foot of successive illustrations in the following pages for their kindness in lending the necessary blocks.

E. A. C.



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# FILING SYSTEMS

## CHAPTER I

### INTRODUCTORY

#### FILING METHODS, OLD AND NEW

THE large and obviously increasing attention devoted in these days by business men and their managers and assistants, as well as by inventors, manufacturers, and selling firms, to what are styled "filing systems," should not lead us to the conclusion that methods of filing business documents, and the manufacture and sale of appliances designed to facilitate the effective filing of business papers, are entirely of recent origin. Such a conclusion would be altogether contrary to fact. There have been methodical men ever since commerce began. There were methodical men, in the modern sense of the word, before there was commerce at all. The earliest records of transactions between man and man had their storehouse—their filing cabinet—in human memory. But the only memory that could be relied upon implicitly, even in those ancient days, was the memory of the methodical man. And in a world in which no two individual minds are alike, in which surprising differences of mental capacity exist, and in which there is, therefore, always a danger that the recollections of two parties to a bargain may prove, on some point of greater or less importance, to be at variance, the need for some other kind of record, not so liable to give rise to disputes, must soon have become apparent. Even barter could not proceed beyond very slight and elementary stages without some definite method of recording transactions. And every definite method of recording transactions involved



some scheme for ensuring the preservation of the record for whatever length of time might prove to be desirable. The record was made in order that it might be referred to afterwards: the particular method adopted for the preservation of that record was so adopted because it was considered to be adequate for enabling the record to be found and consulted afterwards. Here we have, then, the germ, very rudimentary, no doubt, of all our cleverest and most ingenious filing systems. The maxim, familiar to us all in our school days, "a place for everything, and everything in its place," comes down to us from a distant past. It bears upon it the impress of personal experience. It was not coined until men had found, perhaps by painful lessons—for the lessons of life are sometimes painful,—that where there was not a place for everything, or where everything was not in its place, there followed disorder and disaster. The maxim could only have been framed by a man profoundly convinced of the importance and value of method and system. It must have been accepted by the popular consciousness as a wise maxim long before it found its way into the copy books. And before such a maxim could be widely accepted or become a generally recognized truth, the popular consciousness must have been deeply impressed by the contrasting spectacles of the results of method and the results of a lack of method. Every year, thanks to the researches of our archaeological experts, we learn something more concerning the business transactions of nations belonging to a remote and almost forgotten past. We find in Babylonia, in Assyria, in ancient Egypt and elsewhere records preserved to our own times, of commercial transactions of no little variety. These records were not made as an amusement or a pastime. They were made because it was taken for granted that the records would serve afterwards some useful human purpose. They were made to be referred to; they were intended to be referred to. In other words, they were designed to serve exactly the same purpose for which all our modern twentieth century records are contrived. And it is no fantastic literary man's fancy that traces in the baked

clay tablets with their cuneiform and other old-world inscriptions of business transactions, something analogous to the "loose-leaf" systems on which the present day prides itself. We are, therefore, entitled to claim great antiquity for filing systems. They are no parvenu invention of the concluding quarter of the nineteenth century. They have a respectable ancestry behind them. They date from before the days of Homer. They are older than the Pharaohs.

These reflections should help us to see our subject in its true historical perspective, and should save us from certain exultant misconceptions from which the purveyors and advocates of present-day "filing systems" are not always free. And they should enable us to approach the more profitable comparison of the systems of to-day with those of the generations that immediately preceded our own, a little more judiciously than the mere contemplation of the many splendid devices with which modern inventive ingenuity has bewildered the business man of our time, would induce us to do. Our filing systems, we shall see, are not such very startling innovations after all. If we want to get them universally adopted, that is the attitude that we shall assume, and it will be one that is warranted by the facts of history.

Modern filing systems represent efforts to accomplish in the complex conditions of modern commercial life and activity, what our recent forefathers were able to accomplish in simpler conditions in other ways. Their methods served their purposes effectively enough. They would not serve our purposes equally well.

### **The Need for the New Systems.**

The essential fact, the fact that makes it at all worth while to consider the new "Systems," to compare them, to study how best they can be applied to existing businesses, to discuss the uses to which they can be put, is that the conditions of business life have materially changed, and changed in such ways as to rob traditional methods of office work of a large part of their effectiveness. It may be profitable to summarize

briefly the chief of these changes, and to inquire how far they call for corresponding changes in office methods.

First, we have the increased magnitude of business concerns. Fifty years ago a business carried on with a capital of twenty thousand pounds was considered a large concern. To-day it would be considered a small concern. We have many businesses in our midst with ten times that capital, and a large number with a capital that runs into a million and upwards. The scale of profit upon each individual transaction is smaller, but the aggregate profits are larger. The smaller businesses of the past could be controlled by a single man, who could keep in touch with every transaction and with all the details of the business. He needed to keep records of every transaction, and he needed to refer again and again to those records. And he needed to do so without any very serious waste of time. He achieved wonderful things in the way of arrangement and classification of business papers. He achieved them with a few pigeon-holes, a nest of drawers, a few labelled boxes, a few bundles of tape, some tags, and a few index volumes. He could find last year's letters, or those of the year before last, whenever he wanted to refer to them. They were arranged in an order which made it possible for him to find whatever he wanted to find. He could find other business documents, too. It took him longer to put his hands on precisely what he desired to find than it would take the twentieth century man with the twentieth century office equipped with all the latest appliances. But he could always spare the time necessary to find the document he wanted.

The increased magnitude of the modern business has altered all this. A large business in the modern sense means an enormously increased specialization, a division into departments, a sub-division of work. It means also an enormous multiplication of the quantity of business papers, and a multiplication of the kinds and varieties of business papers. Special records not needed in the comparatively small businesses of the past are necessary to enable the details of the great businesses of the present to be traced, to enable the work

of departments to be supervised and kept under effective control, and thus to prevent the doings of the huge modern concern from getting out of hand. The simple devices of the past no longer fit in with the conditions. The attempt to compel them to do so can only lead to constant waste of time, temper, and effectiveness.

But the increased magnitude of the average modern business has been accompanied, and in part promoted, by numerous other changes. The increase in the productiveness of capital and labour, consequent upon the application of machinery to every branch of industry, has meant the much more rapid production of enormously larger quantities of goods, and therefore a corresponding growth in the distributive departments, and in the office work by means of which the entire transactions of the concern are recorded.

Secondly, there has been the vast acceleration that has taken place in the means of transport. The developments of the steamship and the railway, and the general development of the carrying systems of the world, even the development of the parcel post to its present gigantic dimensions: these things, by facilitating trade and commerce, and helping to quicken those operations, have been conducive to the multiplication and the rapidity of transactions. They have made the business man brisker, thrown more work upon every hour of his time, made every minute more precious to him than it was before.

Next we have the wonderful increase in the means and the speed of communication between merchants, manufacturers, and their customers. The marvellous growth of the Post Office, its continual adaptation to new needs, the employment of the electric telegraph as a means of communication, and later the utilization of the telephone for the same purpose, have all conspired to accelerate the pace of commercial transactions and have aided to increase their number.

The Post Office with its various agencies has united with the modern newspaper and periodical press to multiply the facilities for making one's goods known, and therefore for

increasing the number of transactions to be undertaken and to be recorded, and the number of business papers to be filed and preserved for reference.

And then there has been the extensive utilization of shorthand and typewriting, involving rapidity of clerical work, increase in the daily output per head calling for record, and the daily quantity per head calling for filing.

These and other changes have altered the conditions in which the whole work of the business office has to be conducted. They call for radical changes in office methods. They afford ample justification for the production of many new devices for promoting office efficiency. In particular they afford more than ample justification for the production of the new "filing systems" now on the market. It need not be assumed that these are all equally good or all equally well adapted to every type of business. But there are some clear principles by which it should be possible to judge them all. There are some necessities which they must serve more effectively than any of the older methods if they are to make good the claims of their inventors. There are certain things that every good filing system should be able to accomplish within its own limits of usefulness. It is proposed in future chapters to inquire what these are, and to discuss how and in what ways modern recording and filing schemes attempt to accomplish them.

## CHAPTER II

### ESSENTIALS OF A GOOD FILING SYSTEM

It seems necessary, before proceeding with the discussion of this important topic, to clear away a preliminary misconception. Traders and advertisers have largely adopted the word "system" as the name for a set of office appliances designed to enable some more or less definite method of filing to be carried into effect. Thus it has come about that to many minds the very expression "filing system" conveys no other meaning than that of a collection of files and a number of special receptacles for containing them and retaining them in some predetermined order. It is something of this kind that many people think of instinctively when they see the term "filing system" in print. But a system is more than a set of appliances. Appliances are merely the tools whereby the system is to find its outcome in practice. The appliances are subordinate to the scheme in pursuance of which they have been brought into existence. The scheme is the system. The distinction is important for the purposes of the present chapter. A system, in the sense of a thoroughly thought-out scheme, may be adaptable to the changing conditions of a particular business, and yet the appliances at first introduced to put the system into practice may prove to be unadaptable to certain subsequent conditions or only adaptable to an insufficient extent or in a not completely satisfactory manner. New appliances may be desirable to meet the new conditions. But the system, the scheme, remains. It is, then, in this sense of a thought-out scheme for the filing of business papers that the term "filing system" will be used in the present chapter.

What are the characteristics of a good filing system in this sense ?

**Simplicity.**

In the first place it must be simple. It must be one that can be easily understood by every member of the staff, for it is through the staff that it will be worked. The new recruit to the office will have to be initiated into it ; and he will have to be initiated into it quickly if he is to be soon put to use as an active element in the general work of the establishment. To meet this requirement the scheme must rest on a basis that any ordinary office worker of average capacity and brains will have no difficulty in understanding. The principle on which the system is built up must be such as the typical clerk will be able readily to grasp almost immediately it is explained to him ; and the principle must be applied throughout in such a way that the precise method of its application shall be intelligible to the typical clerk after a very little practice. To state the same thing in another way, any practicable filing system must be free from complication and from over-elaboration.

It will probably occur to some readers that the danger of complication and over-elaboration here hinted at is largely imaginary. Unfortunately this is not the case. To a certain type of mind, by no means uncommon among business men, the very attempt to devise a systematic scheme carries with it serious possibilities of danger. The love of system is apt to develop into an all-absorbing appreciation of system for its own sake, until the mere system comes to be treated as if it were of more importance than the business itself. On a small and slender basis easily understood by everybody, it is only too possible for the man in whom the love of system for its own sake becomes a passion, to build up a complicated and elaborate scheme which it will be difficult and costly to work successfully, and which a very little slip on the part of a subordinate will throw completely out of gear. Even the card system, when employed merely for the purpose of indexing, has been sometimes so ingeniously complicated by an excess of classification and sub-division as to be intelligible only to a carefully trained expert. The system which needs

an expert to apply it or even to understand it, may be a masterpiece of skilful arrangement. But it will not do for the rough and rapid everyday work of the business house. A complicated system demands too much time to work it, too much nicety of attention to keep it going, too much care to apply it, to be serviceable in business life. Simplicity must be the key-note of any filing system that is to fit the needs of the commercial or the professional man.

### **Suitability.**

It must be a system that is capable of easy and complete application to the particular business in connection with which it is utilized. Salesmen interested in promoting the use of specific appliances will glibly and persistently affirm that those appliances are suited to every business under the sun. To some extent most appliances are capable of use of a kind in connection with businesses in general. But businesses vary greatly in regard to detail. They vary greatly as regards the kind and variety of documents used in them, the documents needing to be filed. Written matter that calls for filing is neither similar in quantity nor similar in kind in different businesses. In some businesses every transaction is carried through in a single department. In others it passes successively through several departments. In some it is necessary to keep records concurrently in more than one department relating to the same transaction. In others there is no such need. In some businesses every separate transaction is short and is carried through in a very brief period. There are other businesses in which each single transaction extends over a long period and passes through various stages. Some businesses consist of a multiplicity of small transactions; others of a limited number of large transactions. It is only necessary to take a typical transaction carried through by a firm of engineers, a coal-mining company, a shipper, a cloth manufacturer, a manufacturer's agent, a banker, an accountant, a solicitor, and a stockbroker, to realize that whatever fundamental similarity of basis there



may be in the filing systems adopted by them all, there must be very important and far-reaching differences of detail.

Normally there are two things to be filed. First, there are the documents that have passed between the parties to the transaction, including correspondence, contracts, specifications, maps, plans, invoices, statements, and other written, printed, and lithographed matter. And there are the records of work done, perhaps in several departments, in relation to the transaction. The proportion which these two sets of "filable" products bear to one another varies enormously in different businesses. In one it will be easy, from the very nature of the transactions and the special kind of work that each transaction involves, to keep the whole of the relevant "matter" always filed together. In others it will be absolutely necessary to avoid that course. In one office it will be desirable to keep the correspondence permanently apart from the other "papers." In another it will be particularly foolish to adopt that practice.

The tempting notion that it is possible to take some one scheme of filing and to apply it instantly and effectively to every kind of business must therefore be abandoned. A system that does not suit the business, or in other words, fit in completely with the detailed processes that the ordinary transactions in that business entail, will defeat its own object. No filing system, however attractive, can supersede the necessity for wise organization. It may help to promote the satisfactory working of the particular form of organization decided on, and it may help it in many ways; but it can only do so if it is a system that will prove thoroughly suitable in practice to the business itself.

### **Adaptiveness.**

Few businesses retain permanently the precise form in which they started. Every progressive business grows, and with its growth sub-division of work takes place, departments are organized which did not exist in the earlier stages of the firm's "evolution," and the outward form of the

business operations becomes at length quite unlike that which was apparent in the beginning. A peculiarly modern tendency, more and more noticeable as time proceeds, is the addition of new branches to an old business. An engineering firm, devoted hitherto to the manufacture of a few special machines used in a limited number of businesses, decides one day to undertake the manufacture and sale of typewriting machines. It lays down a new plant, engages a new staff of workmen, opens attractive show-rooms in the principal towns, and enlists the services of agents, travellers, shopmen, and others. A carriage builder, whose business in the past consisted solely of the manufacture of high-class broughams, phaetons, and victorias, finds it desirable to add to that business the manufacture and sale of motor-cars. This involves taking new premises, setting up new machinery, and making a multitude of new arrangements. In the end it may involve transforming the business into a motor-car business exclusively. Another firm begins by importing cocoa in its raw state, converting it into the condition in which it becomes available for use as a popular beverage, and selling it to the public. At first it orders from other firms the bags, boxes, and canisters in which the cocoa is packed for transit to the retail shopkeepers through whom it is ultimately to reach the public. After a time it occurs to one of the partners that a great saving could be effected if the firm, instead of obtaining its bags, boxes, and canisters from outside, were to make them itself. The project is adopted, and new departments are set up, departments involving work of a kind altogether different from that with which the business started, namely, the manufacture and the sale of cocoa in a usable shape. But the process need not stop at this point. Boxes cannot be made without wood. This is obtained in the form of suitable planks from large timber merchants. Some day the question is asked, "Why not import the timber ourselves, and cut it into planks at our own works?" And that question being duly discussed, the proposal is at length adopted. Fresh machinery and appliances are ordered, and in due

course a saw-mill of the most modern type is added to the cocoa manufactory. The proprietors may even carry the process further. They may purchase a forest, and fell their own timber. They may engage a special staff to attend to this department of their business. The timber, when it is felled, will have to be transported to the saw-mills. The firm may decide to charter special vessels, or even to have special vessels built for it for this purpose ; and in that case there will be a shipping department to set up, captains, mates, and crew to engage, and arrangements to be made with docks, railway companies, carriers, and others. New branches will thus have been attached and will increase the complexity of a growing business.

Concurrently with these changes and developments others will probably be taking place. For instance, the boxes in which the packets of cocoa are sent out bear on them printed labels. Arrangements exist for pasting these on. These labels have to be designed and printed, and in a large business a large amount of printing for a large and increasing number of purposes is necessary. "Why should we not engage our own printers and designers and undertake the whole of our own printing?" asks an enterprising partner one day. If it can be demonstrated that, taking all things into consideration, this innovation is likely to pay, the suggestion will be adopted. Printing machines are ordered and installed, compositors are engaged, and a fully-equipped printing office becomes part of the establishment. A similar process of development may go on simultaneously in several directions. The annexation of new and originally unintended branches of industry is a familiar feature of many modern businesses. Thus a business founded in the first instance simply for the retail sale of raw uncooked meat has developed into a large restaurant business with many handsome "eating houses" as part of its assets. Or a company starting to bake and sell a special kind of bread has in course of time become known for a network of well-appointed tea-rooms in every quarter of a great city. Every tea-room may provide accommodation

for customers desirous to smoke or to play at chess. And it may be found worth while to undertake the sale of cigars and cigarettes. And this provision may lead in its turn to the development of a tobacconist's business with separate shops for the sale of all the goods in which tobacconists usually deal.

A draper, selling a few hats and umbrellas and waterproofs, and a few requisites for rowing men, footballers and tennis players, may find the demand for certain of these "specialities" grow so rapidly and so considerably as to necessitate his opening separate departments for each of them. In a few years' time the little draper's shop may have become a mammoth "stores" where almost every domestic and recreative requirement is supplied. From being one simple compact organization for carrying through a single process or a small series of related processes, a business will thus develop into a congeries of separate industries united only by the two facts that they are carried on by one firm, and that they are all subordinate and in a sense related to the main or the chief business of the firm.

It would be easy to give further and more comprehensive illustrations of the working of a tendency that is very noticeable in these days. One might add examples of somewhat similar developments of professional businesses which, under modern conditions, often expand and take on a succession of new departments and finally assume a form altogether unlike that which was originally contemplated. But enough has been said to bring out with some emphasis one very important aspect of the problem that confronts the system-maker. No man wishes to be compelled to adopt a new system every time he enlarges the scope and range of his business by the addition of a new department or the introduction of a new branch. The system that he starts with should be one that is capable of being readily adapted to the details of the organization in its newer and more complex form, as well as to those details which existed in the more rudimentary stages of the business.

This is the more necessary because the successive steps by which a simple compact business undergoes transformation into a large and complicated aggregation of businesses are each slight, and often in the first place merely experimental. The natural impulse as each small or tentative re-arrangement of the business is determined on is to continue the existing system of organization and with it all the accessory and subsidiary methods of recording transactions and filing the records connected with those transactions.

### **A Promoter of Co-ordination and Control.**

It will already have become evident that it is impossible to sever the problem of finding a good practicable filing system from the whole problem of business organization. This is particularly true of all businesses large enough to be carried on departmentally. Each department is to some extent independent but also to some extent dependent upon others. While, therefore, the organization must allow of sufficient separateness of activity to enable the work of each department to be conducted efficiently, it must at the same time provide for effective co-ordination between the various departments. Without some amount of co-ordination there cannot be that complete control that is absolutely necessary if the complex business is to be carried on successfully. The source of origin of the goods dealt with in several departments may be identical. Manufacturing and distributive departments are necessarily dependent upon each other. Several distributive departments may be mutually interdependent. To the extent to which this is the case all departments must not only be kept in touch with one another, but must work in accord. To every business there is a buying side as well as a selling side, and each of these may be divided and subdivided into departments as the exigencies of the concern require. They must all work in co-ordination. And there must be above them all a supreme and effective control, a control that never grows weaker or less effective by reason of the multiplication of departments. The great importance

of achieving this result hardly needs pointing out. How materially it can be promoted by the intelligent use and application of a thoroughly efficient filing system with all the accessories indispensable for putting that system into practice will be illustrated in some detail in a subsequent chapter. All that need be emphasized at this point is that any system worthy of adoption with a view to its application to a growing and expanding business, must permit of constant co-ordination and must not lead to any laxity of control. Obviously both co-ordination and control can be assisted by easy and quick reference to all records showing the transactions and the progress of each separate department. Without co-ordination there may be muddle, and there will be ineffectiveness and waste. Without control the business will get out of hand, with fatal results in the long run. With a good filing system in use, adapted to every peculiarity of the business, every investigation and inquiry needed in order to ascertain the position and working of each separate department will be comparatively easy. The firm controlling hand will be enabled to exert its power promptly. A leakage here, a piece of bad policy there, a blunder of administration somewhere else, an error that betrays lack of judgment or culpable negligence, will readily be traced, so that it may be rectified where rectification is possible or the necessary steps be taken to prevent its recurrence.

A really practicable filing system should be capable of rendering this indispensable service. And in doing so it should, of course, not tend in any manner to hamper the separate work and activity of any of the separate departments which make up the entirety of the business.

### **Accessibility of Records.**

A filing system that is to accomplish with satisfaction to everybody who has occasion to use it, the several results indicated in the earlier sections of this chapter as essential, must be one that enables everything filed to be consulted immediately and without any needless expenditure of time.

Whether it be a letter received from a customer, an inquirer, a manufacturer, an agent, or a professional adviser, or a copy of a letter written to any such person, a trade catalogue, an advertisement, a circular, a statement, an invoice, a telegram, the record of a message received across the telephone or of a discussion at an interview, a contract or copy of a contract, a specification, a plan, a set of designs—whatever the document or record desired to be seen or read at the moment, the system should enable it to be known, without any possibility of doubt, where the document or record is, and should enable the document or record, whatever its character may be, to be found and inspected at once. This, indeed, is a primary and fundamental requisite of an effective filing system. Every system must ultimately be judged by its capacity to provide for this one need.

### **An Organizing Intellect and Methodical Workers.**

No system, however well devised, will work itself. This may seem a mere truism, but it is a proposition the full significance of which may be only too easily overlooked. There is an art in applying and testing and adapting any system. Everything that is intended to be filed must be filed at the right time ; and it must be the duty of some specific person to see that it is so filed. When a document is removed from the file for any purpose it should be ascertainable by whom and for what purpose it has been so removed. It should be the duty of every member of the staff responsible for the filing of any documents, to see that everything taken off a file for any temporary purpose is returned to it with the least possible delay. No disorder or dilatoriness in this respect should be permitted. Whoever may happen to be in ultimate control of the entire filing system of the establishment must exercise whatever vigilance is necessary to keep it working efficiently. He must be quite resolute in insisting on strict adherence to the method prescribed and to every detailed application of that method. The most absolute firmness

in that respect is necessary. This is indispensable in reference to any system that has to be worked by a large staff. A little laxity will lead to deterioration. Method can always be enforced in any office or any department when it is made thoroughly clear and unmistakable to every member of the staff that the prescribed method will be rigorously enforced and that no excuse for negligence will be accepted. The staff must be trained deliberately to work to the system. The caprice or the carelessness of a refractory individual here and there will give trouble for a time. But a staff can be made methodical, and it must be made methodical if a good system is to have a fair chance. The organizing intellect must be there. It must be alert, always quick to detect a lapse, prompt to prevent its recurrence, and determined that the chosen system shall be carried through by every subordinate. The man with the organizing intellect must, therefore, have something more than mere organizing capacity: he must be himself methodical, a model of method; and he must have the character and the personality that will enforce upon all others concerned in the business that respect for the system and that recognition of its importance that will induce them punctually and cheerfully and to all intents automatically—*i.e.*, as a matter of habit—to perform at the proper time every individual duty that is necessary to keep the system always in complete and efficient working order.



## CHAPTER III

### APPLIANCES AND CLASSIFICATIONS

To put into practice any filing scheme that may be determined upon, some suitable apparatus is indispensable. This may be simple or elaborate, inexpensive or costly. It may consist of nothing more than a few rows of shelves, on which the various papers which it is desired to preserve are to be placed, tied up in bundles, labelled in some pre-arranged way, and deposited in some pre-arranged order. Or it may consist of a number of handsome polished cabinets in mahogany, rosewood, or teak, with drawers of various sizes fitted with appliances for the reception and classification of "folders" containing correspondence and every other kind of paper-record with which the business has occasion to encumber itself.

#### **The Open Shelf.**

The mere shelving system is not to be recommended. It is true that the papers deposited on an open shelf can be removed for use immediately they are required, without its being necessary to open doors, and perhaps unlock a cabinet, or to pull out drawers, slide a partition, raise or let down a flap, and then to search among the contents for what is wanted. But the loss of time involved in most of these operations is more apparent than real. The separate collections of papers on a shelf will vary in bulk. If they are laid flat several such collections will probably be placed on top of one another : this course will in many cases be unavoidable. Care will be required in removing and replacing them not to disturb adjacent papers ; and it will be only too easy for them accidentally to get out of order. And an uncovered bundle of papers is a trap for dust. The objection to dust in the business office used not to be very strong. Papers, like the

walls and ceilings of the rooms in which they were lodged, were mellowed and darkened by layers of accumulated "matter out of place." It gave them an appearance that suggested solidity, respectability, and age. There was something impressive about the office that had been in existence long enough to undergo the mellowing process: it breathed an air of financial stability and inspired confidence in the minds of clients, customers, and creditors. To-day, however, we have come to distrust dust, and are ashamed of dirty papers. We want our documents, our records, and all our subsidiary written matter to be filed in such a way that they shall be not only always accessible but always clean. This means the doom of the uncovered bundle on the open shelf.

### **The Unpartitioned Box.**

Among the simple devices that found favour with our forefathers and that linger among us at the present time, was the practice of placing papers, tied up in bundles and labelled or marked in some way to indicate what they were or to what transactions they related, in unpartitioned boxes. Generally, but not invariably, these boxes were made to open in front. Often the arrangement of their contents was primitive. In many instances no attempt at arrangement was made beyond that of tying up separately each bundle of papers and confining the contents of a single box to papers relating to transactions with persons whose surnames happened to begin with the same initial letter. If the various papers were correctly and adequately labelled and the labels were so affixed that they were all perfectly visible as soon as the box was opened, there was not much expenditure of time involved in finding what was sought. But the very fact that there was no special place assigned in the box for any particular set of papers tempted clerks who were entrusted with the duty of finding papers when they were required, and of returning them to the box when the purpose for which they had been removed from it had been accomplished, to become careless as to placing

the papers. In plain English, papers were too often "pitched into" the box "anyhow." And labels became detached, or torn, or obliterated, and it not being convenient to prepare and supply fresh ones at the moment, bundles were left unlabelled. When a box became full another was provided, somewhere else, for subsequent transactions classifiable under the same initial letter. There might be several boxes in use simultaneously, labelled with the same letter. And the unpartitioned box system was open to the same general objections as the shelf system except that the dust did not accumulate on the papers so quickly. And where two or more boxes contained papers under one letter, special indexing arrangements became necessary in order to ascertain in which of the several boxes any particular set of papers was to be found.

### **Pigeon-Holes.**

Then there was the pigeon-hole method. Everything was placed in pigeon-holes, a separate letter of the alphabet being allocated to each pigeon-hole. The pigeon-hole is useful as a temporary resting-place for papers that are to be attended to immediately or in the course of a few days. But as a permanent or even as the normal resting-place for office papers it is inadequate. The space afforded by an ordinary pigeon-hole is too limited to permit of its containing many papers, or papers relating to many transactions. To devote a separate pigeon-hole to each transaction is impossible. Where papers relating to several transactions are deposited in a single pigeon-hole, it is almost always necessary in order to find one set of papers, to remove the whole of the contents of the pigeon-hole and to make a search through them. Modern business men grudge even that small amount of needless expenditure of time.

### **Shallow Cardboard Boxes. Wall Cases.**

Another simple device consisted of small, comparatively shallow, cardboard boxes ranged on shelves, making a business

office resemble a draper's shop. These, of course, are "practicable," and a workable scheme of arrangement is possible with them. But the operations that have to be gone through in order to find any required paper occupy more time than ought to be devoted to the purpose, more time than the business man of the present day is prepared to devote to the purpose. There is a further method of filing correspondence, invoices, and other written matter, in a number of cases hung up on nails or hooks round the walls of a room. They are not exactly decorative; but, even if the arrangement of the cases be unexceptionable, there is a good deal of delay in finding what is wanted at any moment.

### **What is Wanted.**

These contrivances represent real attempts to accomplish the objects, or some of the objects for which all our twentieth century filing systems have been devised. But they are insufficient for present-day requirements. What we have to do is to render as easy as possible, access to (a) the details of current transactions; and (b) the details of past transactions; and further to facilitate the effective supervision and control of current work. The accomplishment of these objects is to be sought not necessarily in fewness or uniformity of appliances, but in a broad scheme of classification and arrangement, easily understood, and in whatever appliances may be necessary to enable the scheme to work continuously, to adapt itself to the changes which inevitably take place in every growing business, and to assist every transaction to proceed smoothly. The appliances must depend upon the method of classification adopted. It remains, therefore, to discuss these.

### **Classification Schemes.**

The obvious division of office papers into those concerned with current transactions and those concerned with past transactions suggests merely the beginnings of classification. Papers relating to a single current transaction may be distributed

in several departments at the same time ; and there may be at any moment two sets of papers in each department relating to the same transaction. There may be, for instance, papers which have been dealt with and papers which are still to be dealt with. There will necessarily be letters, telegrams, and telephone messages to be considered, interviews to arrange, and records to make. And there will be papers which it becomes frequently necessary to take to interviews and for other purposes away from the office.

Here, then, are a variety of elementary facts, which must be taken into account in any scheme of classification that is to be effective. To employ one scheme of classification for the arrangement of papers in one department and an entirely different scheme for the arrangement of papers in another department, or one scheme in connection with papers relating to past transactions, and another in connection with papers relating to current, uncompleted transactions, or one scheme in relation to papers that have been dealt with and another in relation to papers that are yet to be dealt with, is to introduce needless complications and to create occasions for difficulty. The classification scheme should be identical throughout the entire business ; it should apply to every transaction and to every branch of every transaction. And wherever there is departmental arrangement and sub-division of work the scheme should enable intercommunication between the departments to take place without difficulty or delay.

Papers may be classified in several different ways. Various schemes are available. Some of them involve keeping a separate index or a whole series of separate indexes. Others enable the separate index to be wholly or largely dispensed with.

There is the method of alphabetical arrangement. This may be employed in a very elementary manner, or it may be worked out into an elaborate and comprehensive scheme. It has the advantage that its use enables separate indexing to be reduced to a minimum—in some cases to be discarded altogether. Alphabetical classification means the arrangement

of papers under the initials of the names of customers, inquirers, clients, manufacturers, creditors, etc.

There is also the method of numerical classification, in which a separate number is assigned to every transaction or to every person with whom transactions take place.

The methods of alphabetical classification and numerical classification may be usefully combined in a variety of ways and for a variety of purposes. And the two methods may often be employed so as to supplement one another.

A subsidiary means of classification sometimes found extremely useful as a supplement to other schemes and as a means of easy and effective sub-division, consists of the use of several colours. Papers of one kind may be kept in folders of one tint and papers of another kind in folders of another tint, so that the very colour of the exterior will indicate at once the nature of the contents. There are advantages in such an arrangement that make its adoption worth consideration in connection with certain businesses ; but it is obviously of limited utility.

There is further the method of geographical classification, or the arrangement of business papers according to certain defined areas. It is, of course, inadequate as a complete system of classification ; and its use necessitates the employment of other methods of classification. Geographical classification is resorted to chiefly where there are local agencies or branches, or foreign or colonial agencies or branches. The business which originates with each agency or branch is separately classified. The same course is sometimes taken where the country is divided up into districts, each district having assigned to it a separate traveller. In that case every district has its own papers—the papers relating to all transactions originating in that district—classified under its own name. Such an arrangement serves several useful purposes. It enables the principal or the manager to satisfy himself at any moment as to the quantity and value of the transactions proceeding in or coming from any one district, and thus to get at the profitableness or otherwise of the firm's

operations in that district. It also enables him to institute comparisons between the results of the operations in one district and those in another, and to judge which of them offers the most promising field for an extension of the firm's business, or which of them can most suitably be sub-divided and converted into two or more distinct districts; and it enables him to compare the zeal and productivity of the several travellers employed by the firm. There may be special peculiarities which have to be considered in relation to transactions in special localities, and a geographical classification will tend to prevent these from being overlooked.

It cannot be claimed that this furnishes an exhaustive list of the possible varieties of classification, and especially of the subsidiary methods that may usefully be applied for certain special purposes. But attention has been drawn to the principal methods, the methods that may be described as primary. Each one of them is practicable. Each one of them, in its detailed application, involves a number of minor considerations, even when it is applied as an exclusive method. When all of them or any two of them are applied in combination, a number of further considerations arise that call for discussion. The applicability of every one of these methods has been the subject from time to time of a variety of interesting investigations, analyses, and experiments. The results, so far as they have been made known, are on the whole fragmentary, and they are scattered, and not easily accessible. Some investigations have been made expressly for the purpose of guiding inventors and manufacturers of office appliances in the construction of furniture of various kinds designed to facilitate filing. In particular, the problems of alphabetic classification have received considerable attention. Alphabetic classification may mean various things: the expression may be, and, in fact, is currently employed as a designation for various methods, some of them of but partial utility and of comparatively little value, others highly scientific and elaborate. The mere subject of alphabetic classification raises many more subsidiary problems than anybody who has not studied the

topic seriously, trying to look at it in all its possible aspects, would suppose. It is trebly important. It involves not only the whole question of the arrangement of papers according to a purely alphabetic method or a method that is primarily and chiefly alphabetic: it involves also the whole subject of indexing, wherever and for whatever purposes a separate index may become desirable. And, thirdly, it involves the whole question of what appliances, fittings, and furniture generally are desirable to enable a complete and satisfactory alphabetic scheme of classification to be carried into effect. For these reasons it will be made the topic of a special chapter.

### **Horizontal and Vertical Filing.**

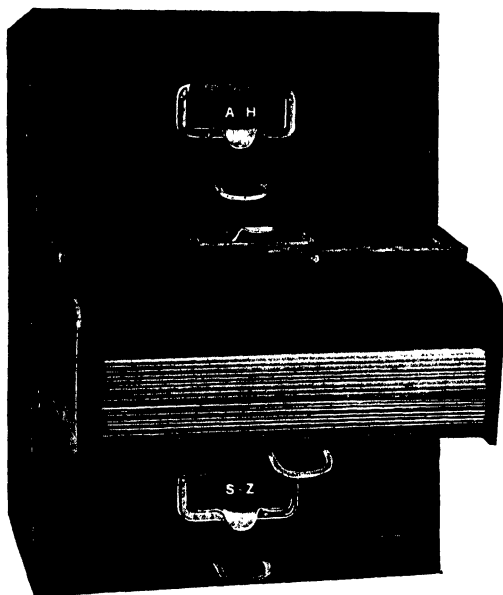
Not only are there rival methods of arrangement. There are also rival methods of filing. The chief differences in this respect are indicated by the terms "horizontal" and "vertical."

"Horizontal filing" means the placing of files or "folders" containing business papers flat, either on top of one another, or on trays or shelves, with tabs or labels enabling ready identification of each separate set of papers. The method is often criticized as ineffective. It is argued that it wastes time, necessitates special and expensive furniture, offers a perpetual temptation to disorder, and is at best but a makeshift. It need not involve these things. Filing cabinets that open in front take the place of drawers, and there may be extra trays and some extra shelving. But there need be no appreciable loss of time in finding and consulting individual files. Nor does the plan, when properly worked, necessarily lead to disorder or involve any greater danger of disorder than its rival method.

But the tendency of most of the modern methods is undoubtedly in the direction of favouring what is known as "vertical filing." "Vertical filing" means the placing of files or folders containing business papers upright in drawers, so that the files or folders stand side by side, with tabs or "guides" annexed to enable the required file or folder to be discovered



immediately. Apparently "vertical filing" is making much more rapid headway into general favour than "horizontal filing," though there are circumstances in which the latter



HORIZONTAL FILING CABINET  
(*Stolzenberg Patent File Company.*)

is on the whole preferable. It is often preferable in the filing of papers bound within their cover. To refer to a paper the file must be taken from the cabinet, and there is thus less likelihood of the paper being lost.

### **General Considerations.**

The question as to which method of filing can most appropriately be adopted for general purposes in any given instance must depend to some extent on the following considerations—

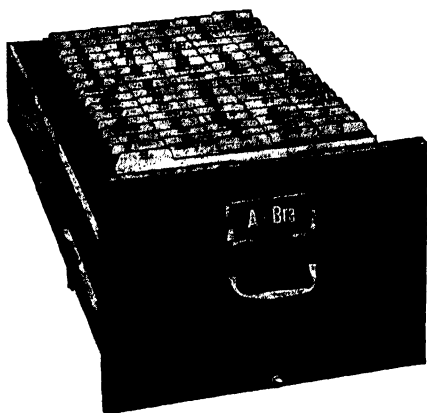
- (1) To what extent are the papers relating to any one

transaction or to the transactions with one correspondent to be kept together, or to be distributed, *i.e.*, filed separately ;

(2) Whether the business is of such a character or size that all papers and records can be conveniently filed and kept in one special filing department under the control of a special clerk who has made himself a " filing specialist " ; or

(3) Whether, owing to the peculiarity of the business, the most convenient course is to have separate files in two or more different departments, so that some of the papers and records relating to a single transaction will be kept in one department and some in another ; and

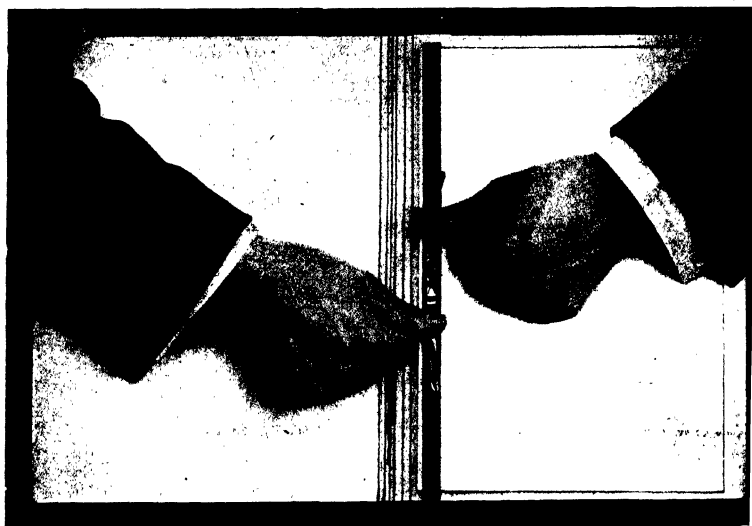
(4) What arrangements are proposed to be made for the withdrawal of folders, papers, and records from contemporary files periodically, or on the completion of transactions or otherwise.



VERTICAL FILING DRAWER  
(*Amberg File and Index Co.*)



TO OPEN



TO CLOSE

FILE WITH BINDER (*Stolzenberg*)

## CHAPTER IV

### ALPHABETICAL CLASSIFICATION

THE most obvious and undoubtedly the most generally useful principle of classification that can be employed, either singly or in conjunction with other methods, is that which is based upon the accepted order of the letters of the ordinary English alphabet. To enlarge on its value or to marshal the various convincing reasons for its adoption and use, is not the purpose of this chapter. The object is rather to discuss what is the precise nature of any alphabetical classification that is to be regarded as completely adapted to promote the objects of a thoroughly sound and practical filing system. For an alphabetical classification is not quite the simple thing that the expression suggests at first sight. If we had to deal with no more than twenty-six persons each possessing a name beginning with a letter of the alphabet different from that with which every one of the others begins, the questions of arrangement that actually arise in practice would be non-existent. If we were dealing with a business in which two or three only of the customers bore names beginning with the same letter, there would be very little to consider. If names, however numerous, were equally distributed or nearly equally distributed over the alphabet, the problem would be enormously simplified. But we have to take the facts as we find them, and we have to be clear in our own minds as to what the facts are. And when we have found out exactly what the facts are, we have to apply our chosen principle to them in the way that will best fit in with the facts. The facts, we shall see, are somewhat complex. It is important that they should be understood.

The considerations which apply to any system designed for the classification of papers apply with equal force to the details of any method of keeping an index. And as for some

purposes an index is indispensable as part of the practical working of every filing system, it will be convenient to discuss problems that arise in connection with alphabetical classification and with indexing together. In order to avoid needless repetitions and lengthenings of sentences, the references will be expressly to indexing alone. The reader will understand that this term is used for brevity's sake, and is intended to include every form of classification that can be appropriately described as alphabetic.

### **Problems of Indexing.**

The unknown man who first conceived the idea of compiling an index had the mind of the true system-maker. He had probably on many occasions wasted much valuable time in the endeavour to find some piece of information that he wanted. He had noticed that it often took far more time to discover the whereabouts of the statements of fact or the expressions of opinion to which he desired to refer than was needed to read them when they were found. Sometimes the disproportion between the time required for the two processes respectively was enormous. One day he hit upon the device of using some *indication* of the whereabouts of records which he was likely to need to consult again, so that he should be able to trace them without repeating the laborious stages of a prolonged search. This was the rudimentary beginning of the great craft of index-making on which, in its more complex forms, so many minds have been engaged during the last half-century. The plan of providing a recognizable indication for one set of facts or for statements relating to one topic, would be inevitably soon applied to other sets of facts and to other topics. At first, no doubt purely artificial methods were employed for achieving the desired result. Arbitrary symbols may readily have served the purpose. But the mind of the true system-maker could not long be satisfied with devices of that crude description. Until the practice of dividing books into chapters, and the equally useful practice of affixing numbers to the pages of books,

became general, indexing must have been a matter of serious difficulty. It could not have been easy to index the contents of a book written on a long roll of papyrus or parchment. But a printed book with pages and other divisions became manageable. It only remained for somebody to recognize the vast possibilities of the alphabet as a means for promoting orderly systematic indexing. That brilliant discovery—and it is fully entitled to that designation, because there is nothing in an alphabet itself to suggest its application as a machine for index-making—led to a multitude of modern methods of classification.

The capability of the alphabet for employment for indexing purposes depended on the earlier circumstance that the separate "letters" were already conventionally taught and memorized in a recognized order. That fact alone made the index, as we know it, possible.

### **The Alphabetical Index.**

The method of indexing business records was probably in the first place applied solely to business books, being imitated no doubt from the practice of furnishing an index in some instances to a printed book. So far as business books were concerned it depended on the use of figures to indicate the succession of entries or the succession of pages. Either each successive entry was numbered or each successive page was numbered. But there always was and there always will be one very important difference between a business book and a printed book—a difference that affects very seriously the problem of indexing. The printed book does not come into use till it is completed, and its index is not compiled till it is completed. The business book is chiefly in use while it is incomplete. Its contents are always increasing. It needs an index almost from the commencement, and the index is always growing. It is possible to arrange the entire contents of the index to a printed book in the most perfect order before any part of the index is printed. It is not possible when the index to a business book is started to

foresee what the ultimate contents of that index will be, what will be the proportion that the entries under one letter will bear to the entries under the remainder of the letters. This has led in practice to some curious results. As the possibility of reproducing those results is not necessarily removed by the mere adoption of modern filing systems, as indeed a badly-chosen system or imperfect arrangements for indexing may lead to the same results, it is worth while to give them brief consideration.

### **Indexing for Business Purposes.**

When it became the practice to provide books for business purposes with a special set of pages arranged and lettered so as to be used as an index to the contents of the volume, the general plan was to allocate the same amount of space—usually a single opening, two pages facing each other—to each of the twenty-six letters of the alphabet. Sometimes the number of separate openings was reduced by allotting one opening only to the two letters I and J, and one only to X, Y and Z.

Now, if there were an equal number of surnames in use beginning with each separate letter of the alphabet, this plan might have proved satisfactory, or fairly satisfactory. But the number varies to a surprising extent. The result was that the space allowed for names commencing with one particular letter would be filled up rapidly, while the entries under another letter would be scanty ; and it might very well happen that under certain of the alphabetic divisions there were no entries at all. Who that has had occasion to consult the index to one of the old-fashioned copying-press letter-books, has not noticed that the opening for, let us say B, is completely filled and that at the bottom of the right-hand page of that opening there is a memorandum, "Continued under I" ? Sometimes it will be found that the available space under I is insufficient to accommodate the whole of the overflow from B, and that the surplus entries have had to be made under Q. Similarly H, being a letter that forms the

initial of a large proportion of English surnames, may encroach upon the space which the manufacturer of the book intended for names beginning with O ; and some of the M entries may turn up under X, Y and Z.

A makeshift arrangement of this kind cannot be regarded as satisfactory. It does not tend to promote the object which all indexing has in view—the saving of time in ascertaining the precise whereabouts of that which you desire to consult. The necessity for the intrusion of one letter into the domain of another can, of course, be minimized by increasing the number of openings allocated to each of those letters which experience proves to require greater space. But it cannot be altogether removed where the index space is prepared before the possibility exists of knowing what exact amount of space will be needed for each letter.

### **Special Difficulties.**

Nor is this the only difficulty experienced with the index that has to grow up in an allotted space and on allotted pages by means of individual additions made from time to time as the contents of the volume increase in quantity. To make the index of immediate value, everything in the volume must have its appropriate index entry made promptly. Each entry will therefore be made in its turn without reference to other considerations. Let us see how the process works. Take the opening devoted to names beginning with the letter A. The first name that it may be necessary to enter may be Ambrose. The second may be Abel ; the third, Avery ; the fourth, Ashwell ; the fifth, Allen ; the sixth, Atkinson ; the seventh, Adams. Arnold, Alder, Ashby, Andrews, Austin, Agnew, Archer, Allan, Addison, Ambler, Ashton, Aikin, Ainsworth, Aubrey, Alexander, Abrahams, and Attwood, may follow in the order here given. If merely a dozen or so of names succeed one another in this way it may be comparatively easy to find any one of them. There may be no appreciable loss of time in picking out the name " Ashton " from among a list of ten or a dozen names all beginning with



A. But if instead of ten or a dozen there are a hundred such names, the delay becomes very real and very considerable. One feels that the index is only partly and very imperfectly serving its purpose as a contrivance for saving time. And when the entries instead of being all comprised in the one opening, are spread over several pages and extend into territory intended to be devoted to entries under other letters, the conviction of the failure of the method is inevitably intensified.

Attempts have been made to mitigate this danger by providing the "index" portion of the book with a large number of separate openings allowing for the subdivision and more elaborate arrangement of the names requiring entry. One opening is made to serve for names beginning *Ab*, another for names beginning *Ac*, a third for names beginning *Ad*, and so on throughout the alphabet. But this plan, pursued systematically, involves devoting an inordinate amount of space to the mere index. Either the book becomes very much bulkier than it would otherwise be, or the space available for the purposes of the book is reduced, making each individual book of less value, and involving an undue multiplication of similar books.

### **A Vowel Arrangement.**

One plan, falling short of this desperate device, is that of ruling a series of perpendicular lines down each page of the index, and entering the various names in the spaces between two of these lines, so that all the names in which the first vowel occurring after the initial letter of the word happens to be *a* are entered in the first space, all in which the first vowel after the initial letter is *e* are written in the second space, and so on, the other spaces being occupied by names in which the first vowel subsequent to the initial letter is *i*, *o*, *u* or *y*.

Following this method, the various names being written in the order in which the contents or the entries to which they refer in the volume find a place there, we get—applying the

list of "A" names already given—the following curious arrangement—

A	E	I	O	U	Y
	Abel		Ambrose		
	Avery				
	Ashwell				
	Allen				
		Atkinson			
Adams					
			Arnold		
	Alder				
					Ashby
	Andrews				
				Austin	
	Agnew				
	Archer				
Allan		Addison			
	Ambler				
			Ashton		
		Aikin			
		Ainsworth			
				Aubrey	
	Alexander				
Abrahams			Attwood		

This plan, while it does to some extent, when you understand it, facilitate reference, is obviously open to many objections. The arrangement is clumsy and unscientific. You have to stop to think out which is the first vowel occurring after the initial letter of the name you require. The question answers itself in simple cases like Adams and Allen. But where several consonants come before the vowel the exact nature of the latter does not rise instantaneously in the mind. In such names as Ambrose, Ashwell, and Ashby, the first vowel, after the initial letter, occurs very late in the word. And when we turn to the names, not very numerous, but

always likely to be among those that have to be dealt with, the names which have no vowel beyond that with which they commence, the method breaks down completely. Where is the methodical clerk to enter such names as Ash, Epps, Orr, Ord, and Ulph?

At the best the plan is a makeshift, not devoid of value, but applicable on a limited scale only. Furthermore, it conflicts with the more natural and more logical arrangement to which we have become accustomed outside the region of business affairs.

### **The Lexicographical Index.**

Just as we are indebted to the unknown originator of the scheme of arranging our alphabetical letters in the order in which we all learn them at school, for the very foundation of all our indexing methods, so for all systematic and complete systems of indexing we are indebted to the dictionary-makers. The lexicon was among the first of the world's books of reference; and the method that the compilers of dictionaries adopted for the arrangement of the words brought together in the pages of their works, has been the model which the preparers of all other books of reference have more or less consistently imitated. The order of the alphabet is followed primarily as regards initial letters, and secondarily as regards the second and subsequent letters in each word. Thus all the words beginning with *Ab* form a class by themselves, and they all appear before any of the words beginning with *Ac*. But they are arranged among themselves in an order based on the same principle. Thus "abandon" comes before "abase"; "abash" comes after "abase" and before "abate"; and until all the words beginning *aba* have been exhausted, we do not reach any of those that begin with *abb*. These being set forth, we deal in the same orderly plan with the various sets of words beginning *abd*, *abe*, *abh* and so on, until we have disposed systematically of the entire series of words commencing with *ab*. Not till we have set out every one of these do we come to the series beginning with *Ac*. We

find these arranged on the same simple plan. And so we travel through the alphabet. Having once grasped the principle—and we are so familiar with it that we forget that there was a time when we had to master it in order to be able to use the school dictionary—we know exactly where to look for every word that we may have occasion to refer to, and, if it happens to be in the dictionary, we are able to find it with the least possible expenditure of time and effort.

This, so far as it goes, is an ideal arrangement. It has been followed by every arranger of the contents of encyclopaedias, and in the main, by every compiler of directories. If we want to find "Canning Road" in a street directory, we know that we shall find it after "Campbell Street" and before "Canterbury Avenue." For all ordinary purposes the arrangement is the best that can be devised. It is easily understood, easily applied; it is complete in itself; and it prevents loss of time.

Before passing from the consideration of the lexicographical method it is important to draw attention to a deviation from that method—or rather a specialized adaptation of it—which has been found necessary for certain purposes. The purely lexicographical plan would serve without modification but for one circumstance which has no analogy in the dictionary. That circumstance has to be taken into account in the preparation of directories, and we may therefore fitly name the resulting plan the "Directory" method.

### **The Directory Method.**

If we were dealing exclusively with individuals the lexicographical method would suffice. But we are dealing with firms and with companies as well. And we are often dealing with different firms having the same surnames. We may wish to classify or index papers relating to transactions with Cook Brothers; Cook, A. & Sons; Cook & Sons; Cook & Smith; Cooks Limited; Cook & Cook; Cook, W. & Co.; and Cook, William. When we turn to such names as Brown and Smith, we find numerous examples of the same kind of thing. How

shall these names be arranged so as to harmonize as much as possible with our general scheme, or so as not to interfere with it?

This is the problem which the compilers of directories have had to face. How have they solved it? The first step has been to keep the names of companies and firms quite apart from the names of individuals. Secondly, the practice has been adopted of always giving the names of companies and firms before the names of individuals. Next the arrangement of the names of the companies and firms among themselves follows alphabetic principles as closely as possible. But in the process of classification the conjunction "and" occurring between two names is ignored. Further, a surname prefixed by an initial indicative of a Christian name, precedes a firm-name in which the Christian name—beginning with the same letter—is set out in full. The combined application of these rules gives us the following arrangement—

- Cook, A. & Sons
- Cook, Alfred & Sons
- Cook, Arthur & Co.
- Cook, B. & Co.
- Cook Brothers
- Cook, C. W. & Co.
- Cook & Cook
- Cook, E. & Co.
- Cook, E. A. & Co.
- Cook, E. & L.
- Cook & Smith
- Cook, W. & Brown
- Cook, William & Co.

When all the names of firms and companies requiring classification have been arranged in this order, the names of individuals possessing the same surname are dealt with.

The list of "Cooks" given above does not include the names of any joint stock companies. If any of the names mentioned happened to be, in fact, the names of limited companies, that circumstance would be indicated by the

addition of the word "Limited" or one of the familiar abbreviations "Limd." or "Ltd.," but the order of the names would remain unaltered. When the official name of a company begins with the definite article, that commencement is ignored. Thus "The Brighton Ironworks, Limited," would be indexed under B, and not under T. Where several companies use the same name as the first word in their titles, the alphabetical arrangement will be determined by the second word in the title, ignoring the conjunction "and" where that happens to be the second word. Thus the directory compiler would arrange a list of companies in the following order—

Brighton Brewery, Limited.

Brighton Coach Makers, Limited.

Brighton and Hove Bakery, Limited.

Brighton Ironworks, Limited.

Brighton Pier Co., Limited.

Brighton and Worthing Omnibus Company, Limited.

One further point with reference to directory classification calls for notice. It concerns the arrangement of the names of persons having the same surname, especially where these are at all numerous. We may have correspondence with A. Wood, A. T. Wood, Alfred Wood, Arthur Wood, James Wood, W. Wood, William James Wood, W. K. Wood, etc. In arranging these the directory compiler always gives precedence to mere initials. Therefore A. T. Wood will come before Albert Wood. But all the "A's," whether mere initials or full names, will be grouped together. You will not find

Wood, A.

Wood, B.

Wood, F.

Wood, Albert,

etc.

The total arrangement will be on the lines of the following list—

Wood, A.

Wood, A. T.  
Wood, Albert  
Wood, Alfred  
Wood, B.  
Wood, B. F.  
Wood, B. J.  
Wood, Benjamin  
Wood, Benjamin James  
Wood, Benjamin William  
Wood, C.  
Wood, C. M.  
Wood, Charles,  
etc.

### **The Business Man's Method.**

As any classification made by the business man for indexing or other purposes will be a classification of names, its main requirements will be more analogous to those of the directory compiler than to those of the dictionary maker. Therefore the advice often given in connection with the preparation and arrangement of the card index, "Follow the dictionary," must be dismissed as inadequate. It does not meet the whole of the requirements. But as the directory method is merely an adaptation to special purposes of the dictionary method, so, it is suggested, the business man's method should be an adaptation to business purposes of the directory method. It would be insufficient to follow exactly on the lines of the dictionary. It is unnecessary to adopt all the indispensable refinements of the directory. But the directory method is the ideal to which the business man's method must approximate if the best results possible from an index or the fullest advantages of a complete and workable classification scheme are to be secured.

### **The Business Book Index.**

There are, of course, limits to the applicability of the directory method to business purposes. It cannot be employed

in its entirety where the index occupies part of a book and is made up of entries written into it one after another from time to time. To apply the directory method completely to an index compiled in that way would involve an impracticably large number of sub-divisions. A separate index volume, large enough to permit of every possible or even of every necessary sub-division to enable the directory plan to be followed in every detail would of course solve the difficulty that exists where book indexes are concerned. But for most of the purposes of the business office the separate book-index is undesirable. And our problem is not to increase but rather to diminish the number of books in use in the office. To be unable to refer to one book without first referring to another is always unsatisfactory. To have the index to one volume contained in another is particularly unsatisfactory. A business book in use for business purposes must, if it needs indexing, contain its own index within its own covers. Such an index must, by the necessities of the case, be based on a merely alphabetical arrangement, ignoring all the niceties of the efficient and complete lexicographical arrangement, or of the more appropriate directory arrangement. Fortunately, however, modern methods enable us to dispense with the book index and to avail ourselves of other devices that serve the purpose more effectively and permit of a very close approximation to the directory compiler's plan.

### **The Card Index.**

With the use of cards for indexing purposes all the special difficulties of the business book index disappear. A card index can grow to any extent, it can expand at any point and at any time, it can contract itself here and spread itself there, without departing in the smallest degree from the order which its contents were originally designed to follow. It permits of the minutest and most systematic classification and sub-division. The importance, and growing and varied uses of cards in these times for business purposes, and their remarkable adaptability to the special circumstances of



special businesses call for separate treatment of the subject. All that it is desired to point out here is that the card-index is one of the modern devices that do permit of the employment of an ideal scheme of arrangement.

### **Self-Indexing Schemes.**

But the card-index does not stand alone. There are methods of making records and other papers index themselves, as it were, automatically. The discovery that while we are arranging things we can, in many instances, arrange them in such a way that the arrangement itself shall serve all the purposes of an index, was a brilliant and fruitful discovery. Loose-leaf systems permit of perfect self-classification of records; certain systems of filing in "folders" permit of the equally perfect self-classification of other papers. And there are other self-indexing methods in vogue.

Where a Numerical Scheme of arrangement is adopted a separate index (usually a "Card Index"), is necessary, and the same conditions apply to such an index as to the arrangement of papers according to one or other of the self-indexing methods.

### **Relative Frequency of Initial Letters.**

For the proper utilisation of any self-indexing scheme, office equipment of some special kind will be needed. In considering the details of whatever form of equipment may be determined upon, it will be found that there still remain certain important questions concerning alphabetic arrangement to be disposed of. As has already been pointed out, the number of names beginning with each letter of the alphabet varies greatly. When we come to the task of ordering cards, folders, or other filing apparatus with the indispensable accessories, guide cards, tabbed cards, signals, labels, etc., the question of the relative provision to be made for each letter becomes important. It may therefore be useful to devote a little space to the consideration of the topic.

An analysis of the contents of the "Commercial" section

of a town directory would appear to be the simplest method of arriving at a general idea of the relative frequency of English business names beginning with each of the several letters of the English alphabet. Appended are the results of such an analysis made by the present writer. The figures given opposite each letter represent the number of pages occupied in the directory by the names of the various business individuals, firms, and companies classified under that letter. Except as regards Z, small fractions are omitted,  $18\frac{7}{8}$  or thereabouts being stated as 19, and  $35\frac{1}{8}$  or thereabouts being stated as 35. The total number of pages comprising the "Commercial Section" of the directory used was 523.

Letter.	Pages occupied.	Letter.	Pages occupied.
A	15	N	9
B	60	O	5
C	45	P	32
D	23	Q	1
E	12	R	24
F	19	S	50
G	27	T	22
H	43	U	1
I	3	V	4
J	13	W	44
K	12	X	0
L	22	Y	2
M	35	Z	$\frac{1}{8}$

In studying this list it will be seen that six letters, viz., B, S, C, W, H and M, occupied more than one-half of the space taken up by the whole. A simple calculation will reveal the further fact that adding to the total number of pages allotted to these letters the additional letters P, R, D and L, no fewer than 378 of the 523 pages are given up to ten letters, leaving 145 only for names beginning with the remaining sixteen letters. A detailed examination of the figures shows that 11 per cent. of the total space is required for names beginning with B, rather more than 9 per cent. for names beginning with S, nearly 9 per cent. for names beginning with C, about 8 per cent. each for W and for H, and approximately

7 per cent. for names beginning with M. For I, Q, U, Y and Z, on the other hand, the percentage is infinitesimal.

These figures may serve as an indication of the proportions in which in an ordinary office it will be necessary to make provision for the relative storage accommodation of papers to be filed or indexed under each separate letter of the English alphabet.

Mr. W. A. Amberg, the inventor and manufacturer of well-known apparatus and accessories for business filing, has made a much more extensive and elaborate analysis of English names. His analysis comprises as many as 163,232 names, the object being apparently to get together and classify as comprehensive a list as possible of the names in use in the United Kingdom. The total recurrences of each name that occurred more than once were recorded. From the resultant figures Mr. Amberg determined the number of divisions which it would be necessary to assign to each letter in any alphabetical filing appliances making provision, by means of necessary sub-divisions, that should be as nearly as possible exactly sufficient for the requirements of each individual letter of the alphabet.

Taking the total number of divisions necessary for the whole alphabet as 600, he allocates them as follows, the calculation being based on his analysis of English names—

Letter.	Divisions required.	Letter.	Divisions required.
A	20	N	13
B	63	O	6
C	49	P	33
D	26	Q	1
E	14	R	29
F	22	S	58
G	30	T	24
H	50	U	2
I	4	V	5
J	15	W	46
K	13	X	3
L	29	Y	
M	45	Z	

A comparison of these figures with those already set out as the results of an analysis of the " Commercial Section " of a single town directory will show that in all essential respects the two lists are in practical agreement. Mr. Amberg's analysis had a further object in view, that of ascertaining in what manner and to what extent provision could best be made for the sub-division and sub-classification of the various names beginning with each separate letter. It will be seen that in his list the six letters requiring the largest amount of space to be assigned to them in a filing system are, in this order, B, S, H, C, W, M, and that these are followed in the order of frequency by P, R, L and D. In the two lists H, C and W follow each other in a slightly different order ; and in one of them L comes before D, while in the other D comes before L. But in both lists H, C and W run one another very closely indeed, and the same thing is true of D and L. The actual difference of order as regards these letters is, therefore, unimportant.

Here then we have a definite basis for calculating the space we shall require for each letter of the alphabet in any equipment of furniture or other apparatus for carrying out our chosen scheme of filing, our system of alphabetic classification, or our system of indexing.

If the persons with whom we deal in our particular business happen to be composed exclusively or mainly of Welsh people neither of these analyses will serve. B and S will take a lower place by reason of the considerable diminution that will occur in the number of Browns and Smiths who will figure in the list ; and J, L and E will demand more space in order to provide accommodation for the numerous recurrences of such names as Jones, Lloyd, Evans, and Ellis.

## CHAPTER V

### NUMERICAL AND ALPHABETICAL SYSTEMS

THE rival plans of filing papers in numerical order and of filing them in alphabetical order, have been the subject of a good deal of controversy. Each method has its advocates. It may be useful to compare the application of the two methods to the filing of that most indispensable and universal of all "business matter"—correspondence.

#### **Filing Correspondence (a) Numerically ; (b) Alphabetically.**

The term "correspondence" must not be taken too literally. Incoming letters and copies of outgoing letters are not the only communications that need filing. There are, in addition, telegrams received, copies of telegrams dispatched—for the prudent man of business is as careful to keep a copy of every business telegram that he sends out of the office as he is to keep copies of his letters—records of telephone messages arriving at or dispatched from the office, records of messages left with clerks by callers, and in some instances minutes of interviews. Some folders are furnished with binding arrangements, fasteners or other devices for holding their contents together so that they can be always preserved in chronological order. Others are without these, and are merely receptacles for containing correspondence, the individual items of which are not attached to the folder, but may be kept loose and apart from one another or fastened together by a paper fastener, or by one or other of the numerous devices now on the market for attaching papers together. Having regard to the differences in size of the communications, a letter on a half-sheet of note-paper, another on a quarto half-sheet, and a telegram, following one another ;

having regard also to the varying texture and thickness of the customary communications and copies, the placing of a carbon copy next to a stout sheet of paper, with perhaps a post card to follow; and having regard further to the obvious effects of the different methods of folding adopted for the purpose of enclosing a letter in an envelope—methods resulting in intractable creases that encourage “slipping” and consequent disorder—it is generally desirable, with the object of ensuring the preservation of each individual item on the file in its proper place in order of date, that some system of fastening the various communications together should be employed.

It is possible to file correspondence so that on opening the folder the first letter in order of date is visible, successive communications following. But it is preferable to place the successive communications one on top of each other, the first being at the bottom and the last on top, so that on opening the folder the latest communication accosts the eye. It is more frequently the most recent communication that is required to be consulted than any communication of an earlier date.

Every correspondent has his own folder. In some instances this is not quite the case, for a separate folder is not assigned to a correspondent until the communications to be filed under his number or name reach a certain minimum. The man of one letter may be relegated to a “sundries” file, of which there may be several in use simultaneously, these being of course the subject of a classification of their own. That, however, is a minor detail, and for present purposes the correspondents whose communications find a temporary resting-place in a “sundries” folder, may be left out of account.

It will be evident from this that so far as correspondence is concerned, it is the “folders” that are to be made the subject of classification: it is these that are to be arranged either numerically or alphabetically. Let us consider the method of numerical arrangement.

## Numerical Arrangement of Correspondence Folders.

When it is decided to adopt and employ a numerical system of filing, the first folder used is marked 1 ; the next one used is marked 2 ; and so on. No question of name is allowed to affect the choice of the number assigned. The sole determining fact is the order in which the several folders are brought into use. But a number does not, by itself, convey any intimation of the name of the correspondent whose papers are filed. That fact must be ascertained by some other means. Numerical filing therefore implies an index. The index is usually brought into existence by means of cards which are themselves kept in alphabetical order in a drawer specially provided for the purpose. If my first correspondent after I have introduced a filing system based on a numerical arrangement be *John Smith*, I write or type his name on an index card, mark his folder " 1," and note on his index card that his correspondence file is *No. 1*. Probably I enter certain other particulars on the card. Whether I do or do not, I place the card in a special card drawer in its proper place under the letter *S*, and place the correspondence folder in its proper place as "*No. 1*" in the correspondence cabinet. My next correspondents may be the firm of *Hill and Son*. To them folder *No. 2* is assigned, and they are provided with an index card which finds its place in the card drawer under the letter *H*. The third correspondent may be *Thompson*, and the fourth *Brown*. Their communications are filed under *Nos. 3* and *4* respectively. And so on day after day, week after week, year after year, while the business endures or the particular method of filing adopted is continued.

It will be obvious that on each occasion upon which it becomes necessary to refer to the correspondence with any single person, firm, or company, or with any public body, one is obliged to consult two things. First, the card bearing the correspondent's name has to be found. From that has to be ascertained the number of his correspondence file. Then the correspondence file has to be found. Advocates of the

alphabetical system of filing object that this represents a quite needless duplication of effort. They point out that if the correspondence were filed not under a number but under the correspondent's name, no more time would be occupied in finding the folder than is occupied under the numerical system in the preliminary search for the index card. They argue, therefore, that the additional process entails an unnecessary expenditure of time. The alphabetical method is self-indexing and necessitates one search instead of two. To this the upholders of the numerical method have several replies. First, they say that the time expended in finding the index card is infinitesimal. They point out that, in many instances, it is altogether unnecessary to consult the card. Just as the book-keeper remembers the folios in the ledger in which a large number of accounts are entered, and has no need to turn to the index to ascertain the whereabouts of those accounts, so the "filing clerk" will remember the numbers assigned to a certain proportion of the firm's correspondents, and will be under no necessity to look up the relevant index card. This will be the case, they urge, with regard to all correspondents with whom communications are frequent and numerous. Secondly, they urge that for many other purposes an index card is almost indispensable, that where it is in use it proves to be a time-saver in the office in a multitude of ways, and that it is worth having, whatever method of filing be adopted. Thirdly, they urge that the numerical method permits of application not only to correspondence but to other papers that have to be filed, and permits of an easy and effective co-ordination between them all. And further they claim that it promotes economy in office equipment, economy in quantity and bulk of furniture, economy in space so far as office-room is concerned, and consequently economy in outlay.

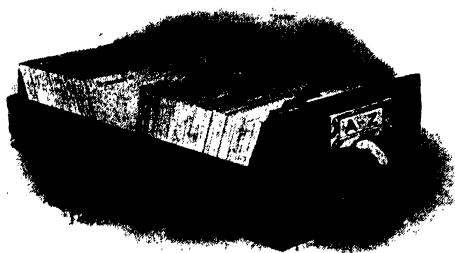
It is worth while to develop these arguments in detail.

### **The Card Index.**

First, as to the necessity of a card index. Nobody who has utilized a well-compiled card index will entertain for a moment



a doubt as to its value. By itself it is capable of superseding several other registers that have been necessary in the past. It takes the place of the old address book, and it fills that place far more efficiently. With cards arranged in directory order, according to the plan explained in a previous chapter, any correspondent's address can be found far more quickly than is possible where the pages of the old-fashioned "address book," with its crude attempts at the most rudimentary form of alphabetical arrangement, its alterations, excisions, and additions, have to be consulted. Then the cards which form



ALPHABETIC CARD INDEX DRAWER  
(LIBRARY BUREAU, LTD.)

the register of names and addresses of correspondents may and should tell us several other useful facts beside the precise postal whereabouts of those correspondents. Each card may and should bear on its face a record of the telephone number of the

correspondent to whom it relates ; it may and should record also his telegraphic address, if he have one. It may further mention the name of his banker, so that cheques payable to him may be sent out completely crossed. It may mention the name of the person who introduced him, or the names of any references as to his position and responsibility. If he was secured as a customer through the canvassing of a particular traveller or agent, the name of the traveller or agent may be written or typed on the card after the words "introduced by." If he be a correspondent who wrote in response to a newspaper advertisement, that fact too may be recorded on the card, the name of the newspaper in which the advertisement appeared being noted. If the correspondent be a man who deals exclusively or chiefly in one special

“ line ” of goods, that fact also may be recorded on his card. And there are other items which in special businesses or in special circumstances connected with any business it may be equally useful and convenient to note on the one card. Where the correspondents happen to be a firm, the individual names of the several partners constituting the firm may be written or typed on the card. Where they happen to be a company, the names of the managing director and the secretary may usefully be added. Each of these items occupies but little space and requires but little time to enter. The card thus becomes a valuable compendium of information with regard to the correspondent whose name it bears.

Having introduced so valuable a method of concentrating in one compact space so much useful information concerning every single correspondent, and being able to use that card for so many of the everyday purposes of the office, we are asked, why should it not be made to serve the purpose of an index to all the filed papers and records? It is there; practically it must be there; its place can only be taken by a variety of other detached and disconnected records not so easily arranged, and not so easily accessible. Why not make the most of it? The numerical arrangement enables it to be made the most of. An alphabetical arrangement leaves it isolated, useful as far as it goes, but less useful than it might be.

### **General Utility of Numerical Scheme.**

The further argument in favour of a numerical scheme that it permits of application not only to correspondence, but to other papers that have to be filed as well, and that are usually filed quite apart from the correspondence, and that it permits of an easy and effective co-ordination of all the papers relative to any single transaction or set of transactions, is a weighty one, not to be lightly dismissed. It reminds us that the filing scheme must be considered as a whole. It reminds us that there are other things beside correspondence which it is necessary to file.

The many different sets of papers, records or articles it

may be desirable to file, may be arranged among themselves in numerical order, and a simple reference to each of them on our index card will show their connection with one another. There are several ways of doing this. We can, for instance, decide to classify the whole of our office correspondence under the letter A. In that case the correspondence with John Smith will be filed in a drawer labelled A, his folder being marked A1. We may determine to assign the letter B to contracts, these having a separate drawer to themselves, appropriately labelled. We may classify contracts under B. If there be a contract with John Smith we shall find it in the drawer labelled B, where it will be marked B1. We shall record these markings on our index card. If there is no B1 mentioned there, we shall know that there was no special contract with Smith. If we receive a catalogue from Smith we shall mark it C1 and file it separately as the first of what in the ordinary course will become a collection of business catalogues. We may have received also a sample from Smith of such a nature that it is possible to preserve it ; and reasons may exist which make it desirable to keep the sample. We shall mark it D1, and file it as the first of a possible series of samples. And so on with everything else that we file in relation to the transaction. If our accounts are kept on cards or by a "loose-leaf" method, we can continue the application of the numerical system to these. The index card forms the connecting link between them all. Having once ascertained the requisite class number by consulting the index card, we can find everything we want and can trace the entire transaction through every stage, with no further search. All our records are co-ordinated.

### **A Subject-Index.**

But this is not all. A letter may contain, among other things, quotations for articles of a certain description or information that may be useful subsequently in connection with the business, when the correspondent's name may be forgotten. Or it may be accompanied by circulars, newspaper cuttings

or other printed matter which it may be desired to preserve with a view to possible use hereafter. Reference to all these may be rendered easy by the practice of keeping a "subject-index." Suppose, for instance, that in a letter received from a customer, an agent, or a wholesale dealer, there appears some valuable information with regard to the possibilities of a growing market in Uganda for hardware goods. You do not at the moment propose to attempt to push the sale of your goods there. But you feel that the idea of doing so may very well be considered at a future date. If anything should lead you one of these days to think it worth while to consider the project seriously, you will want to be in a position to put your hand upon the information. Buried away in a letter from a correspondent whose name you do not remember, and as to the date of whose communication you have but the vaguest idea, you will probably never find the information. But if, when the letter arrived, you started two subject cards, one headed "Uganda as market for hardware goods," and the other headed "Hardware goods, Prospects of market in Uganda," and if on each card you had written or typed merely the number of the correspondence file in which the letter is to be found, and the short date of the letter, you will be able to place your hand on the information almost instantaneously, however long may be the interval that has elapsed since the receipt of the letter containing it. Further illustrations of the usefulness of a subject-index and a discussion of how that index may be correlated with a name index will be found in a later chapter. All that is intended here is to illustrate the manner in which such an index can be kept where the numerical system of classification is adopted. It is claimed by the advocates of that method that it is far more easily applicable to a subject index than is any other method of classification.

### **A Varied Numerical Scheme.**

The particular application of the numerical scheme already explained represents but one of several possible developments

of the numerical system. On a simple numerical basis, reinforced by the judicious use of index cards, we can work out a variety of filing schemes, each capable of proving in practice the general utility of the numerical system. In many quarters objections are felt to the practice of assigning a uniform number to papers and records of all kinds concerning a single correspondent. The practice is criticized as wasteful, and as likely to lead to practical difficulties of arrangement. There will be, it is pointed out, a certain number of correspondents from whom there will be nothing beyond correspondence to file, to whom invoices will not be sent ; there will be some who will neither give nor receive orders ; only a very small minority will send catalogues, circulars, or other printed matter or samples which it may be useful to retain for future reference. If the catalogues, for instance, are to bear the same numbers as the same correspondent's correspondence folders, it may very well happen that the actual catalogues filed in succession will be numbered 3, 7, 11, 15, and so on, a circumstance which will involve leaving many spaces unoccupied in the drawer containing them. It will be sought to avoid actual gaps among the files by placing them as close together as if they were consecutively numbered, file No. 29, for instance, following immediately after file No. 13. This arrangement, however, is but a makeshift. It can hardly be regarded as satisfactory from any point of view, and it presents certain inconveniences when the files are in use. To make it safe, it needs to be supplemented either by a "Contents List," kept always in the cabinet, recording the numbers assigned to papers filed there, or a list, also kept always in the cabinet, stating the numbers which have *not* yet been assigned to files in that cabinet. Unless some such device be employed, it will be impossible to say with certainty that all the files are in their place, since the absence of a number suggests the possible absence of a file which should be there.

It is possible quite effectually to surmount this difficulty without abandoning the numerical system. The files in each

class will be numbered consecutively from 1 onwards. There will then be different numbers for the same correspondent's files in each of the different "classes" in which his papers may have been filed. Thus a single correspondent's files may be A 12, B 2, C 7, D 9. The same index card will still serve. All that is necessary is to note on it the separate class numbers. Catalogues, circulars, etc., will be numbered consecutively from 1 onwards, the number of each being entered separately on the relative index card. No further cards will be necessitated by this plan; the arrangement of the filed papers will be more satisfactory; and there need not be any very considerable expenditure of time in finding anything that is required in excess of that involved in finding it when the "uniform number" method is employed. There will also be the very important additional advantage that it will never be a matter of doubt whether all the files which should be in any particular cabinet are actually there.

These details will serve to show that the numerical method, whatever there is to be said against it on other grounds, is capable of great elasticity in its application.

### **Simultaneous Transactions.**

One further illustration of its utility may be mentioned. Several distinct transactions may be proceeding simultaneously with the same correspondent. There may be special reasons for keeping the papers relating to each transaction quite apart from those relating to any of the others. Where a transaction is complicated and involves a large amount of correspondence, where therefore the file is likely to be much in use, it will save time if there are no papers on the same file concerning other transactions. One can read each filed letter in its turn without having to discover when half-way through it that it has nothing to do with the particular item of business in connection with which the search is being made. A simple development of the numerical scheme gets rid of this difficulty quite effectually. We still employ the one number assigned to the correspondence file. But we add a decimal.

Thus, if the correspondent's original number is 89, we mark his first folder 89-1, the folder containing papers relating exclusively to his second transaction 89-2, the folder containing the correspondence relative to his third transaction 89-3, and so on with all his subsequent transactions. We can show by notes on his index cards to which particular transaction each of these numbers has been assigned, and can, therefore, select the precise folder that we require with as much ease as if there were no more than one folder assigned to the particular correspondent. A similar plan can, of course, be applied to each separate set of papers filed apart from the correspondence.

### **Numerical Method Economical.**

It is furthermore claimed for the numerical method of classification that it is conducive to economy, that it enables a beginning to be made with a small and therefore comparatively inexpensive equipment which can be increased as the necessities of the business demand, that it makes it possible to avoid all waste of space in the actual filing drawers or cabinets used. If, for instance, you determine to file your correspondence numerically, you can start with one drawer or one section of a filing cabinet as a receptacle for your correspondence folders. This will be furnished with "guides" projecting above the folders, indicating the numbers on the folders filed. The "guides" may show the whereabouts of folders numbered consecutively from 1 to 250. As folder after folder is added each place in its turn is filled. There are no vacant spaces. The time will arrive when the whole of the space available is occupied. Another filing drawer or section of a filing cabinet can then be added beginning with the number next following the number assigned to the last folder inserted in the first drawer. Supposing that number to be 250, the second drawer will begin with No. 251.

It is claimed that this plan enables the initial expense of installing a filing system to be reduced to a minimum, and that it also keeps down the necessary subsequent expense involved in the development of the system by reason of the growth of

the business. It is pointed out that the alternative method involves an equipment to begin with capable of dealing with every letter of the alphabet, and if it is to be completely efficient, with every alphabetic sub-division, as *ab*, *ac*, *ad*, etc., and that to provide spaces with guides and other appliances for the effective alphabetic classification of the correspondence means more numerous appliances to start with, and correspondingly increased expense. It is urged further that there will always be vacant places in the filing drawers or cabinets under certain of the alphabetic divisions, and that in any case those divisions will fill up unequally, and will therefore necessarily, at an early stage, be spread over several filing drawers, where with the system of numerical classification one only will suffice.

### **Merits of the Alphabetic Method.**

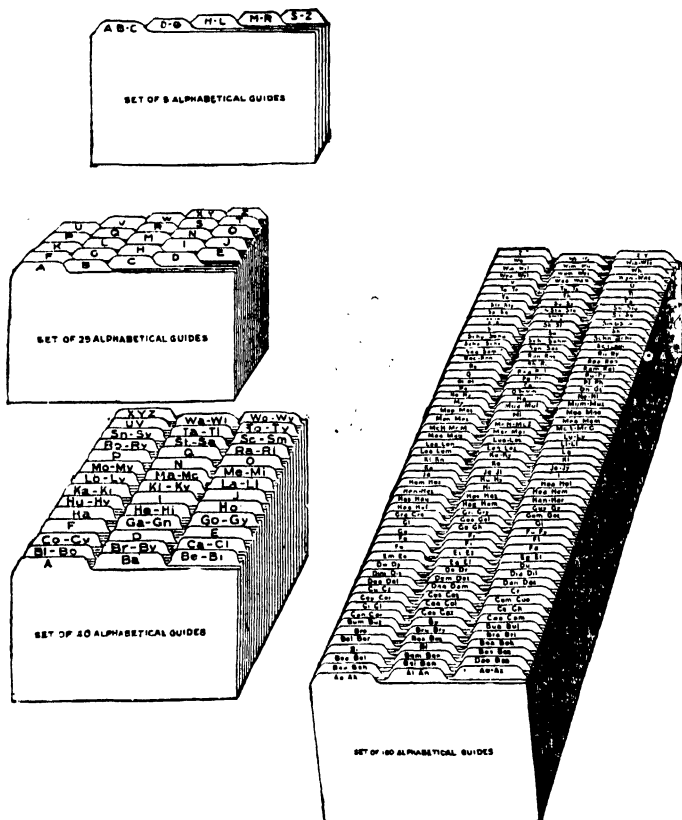
Alphabetic filing has its uncompromising advocates who are prepared to defend it against all comers. It is urged that it is the simplest possible system of filing, that it is more easily adapted to the requirements of an expanding business than any other method, that it is capable of meeting all the needs of a sound and effective arrangement of business papers, that it will serve equally well for "subjects" as for "names," that the correlation and co-ordination of filed papers is as easy with it as with any other system, and that it can be worked in conjunction with a card system or loose-leaf system, and indeed can be worked in and through and by means of both or either of these, and that it is free from all the complications of other systems and consequently from certain dangers to which those systems are liable. These are large claims. To examine them it will be useful to consider the alphabetic system in practice, to see how it works and to contrast its working with that of its great rival, the numerical system.

### **Alphabetic Filing in Practice.**

Briefly stated, the alphabetic system means, in application, the practice of filing all papers and records, whatever they



are, and however much they may be sub-divided and classified among themselves for convenience of reference in the office,



GUIDE CARDS (GLOBE-WERNICKE)

in alphabetical order. The most desirable form which alphabetic order may take has been discussed at length in a previous chapter, in which the details of a full and satisfactory alphabetic system of classification have been explained. All that

it is necessary to add at this point is that wherever, in what follows in the present chapter, reference is made to alphabetic filing, the full directory method is to be understood as intended.

One of the modern filing systems that was very early in the field in this country provides for what has already been described as "horizontal filing." It provides for placing on a single file in its order of date every paper of whatever kind—with the one exception of book-keeping entries, which are kept apart for obvious reasons—concerning a transaction or series of transactions with a single client, customer, wholesale house, manufacturing firm or other person or company with whom dealings take place. You may sub-classify either by name or by transaction; but your fundamental scheme of arrangement is always alphabetical. If you have several transactions simultaneously with the same customer or on behalf of the same client, you furnish yourself with several folders, one for each transaction. There may be correspondence in reference to one transaction from several persons or firms. This is what takes place in many businesses. With an auctioneer, an estate agent, an accountant or a solicitor it is a common everyday occurrence. Instead of assigning a separate folder to each correspondent, you keep together in a single file all the incoming correspondence from whomsoever it may come, and copies of all the outgoing correspondence to whomsoever it may be addressed, relating to that one transaction. The "filing system" referred to supplies folders with attachments for binding the papers together, so that they are firmly held together in order of date, while every one of them can be removed and returned to its place with very little expenditure of time. The file is deposited and kept in its proper place in a drawer with a "let down" front. You may or may not keep cards, alphabetically filed, with the names and addresses of all your correspondents, their telephone numbers, their telegraphic addresses, and other particulars which it will be useful to have easily available. You *must* keep this information in some form or other; and it may as well be on cards as in any other form. But it will

not be necessary to consult the cards in order to find any papers you want. All you need to know is the name of the customer, client, or other person who is the principal in the matter. Armed with this one piece of knowledge you can at any moment turn up any file you require.

But this is not quite the method adopted or recommended by the advocates of most of the modern filing systems having for their basis the alphabetic system of filing. In the generality of these, correspondence is filed under the names of individual correspondents, and is kept separate and apart from all other papers. Orders are filed separately; and a similar practice is adopted with regard to invoices and statements, bills of lading, contracts, catalogues, circulars, newspaper cuttings, etc.

It will be evident that to work either of these schemes necessitates beginning with a larger equipment than is necessary where a numerical system is adopted. You need to begin with appliances capable of providing for the effective filing of papers under every alphabetic sub-division. If you determine to adopt the horizontal "Everything-in-its-place-on-one-file" idea, you must be in a position to keep Adams, Alston, Arnot, and Andrews apart, and in lexicographical order; you must be able to distinguish between the various Browns and the various Smiths with whom you have dealings; and you must be prepared to face the fact that as you are placing all sorts of papers on a single file, your individual files must be larger, and will in use become bulkier than those employed where a scheme involving sub-division of papers is adopted. You may begin with three drawers, one taking papers under A to H, the second taking papers I to O, and the third containing papers P to Z. Time will tell to what extent this arrangement will serve. It may happen that you have an abnormal number of transactions with three or four persons or firms whose names begin with D, and that several big transactions with others possessing names beginning with F absorb a great deal of space, so that it becomes necessary to remove G and H entirely from the first drawer, and transfer

them to the second. There is no conspicuous hardship about this, but it may involve spreading the alphabet over four drawers instead of over three. And you may have to do this before it would have been necessary under the numerical system to begin even a second drawer.

So much for the horizontal "file-everything-in-one-place" system. The vertical classified system need not occasion the rapid changes that the horizontal method entails. But, on the other hand, it means a still larger equipment to start with. For each set of papers intended to be filed separately there must be separate provision extending through the entire alphabet. There will be tabbed guides for all the important sub-divisions under each letter. Without these, reference will not be easy. But once the scheme in its details has been determined upon, and an adequate installation has been made, although the initial cost will be greater, the subsequent cost will be comparatively small so long as the scheme is strictly adhered to. For at allotted dates any one set of files can be withdrawn and placed in transfer cases suitably labelled, and the same drawer is then available, with all its alphabetic guides, for use again for the same series of letters. The papers removed will be placed in the transfer cases in precisely the same alphabetic order which they occupied in the filing drawers.

It is fair to point out that alphabetic filing can, like the system of numerical filing, be commenced with a small equipment. To take the matter of correspondence alone, one drawer with mere alphabetic guides from A to Z may serve the purpose for a time. There are systems in which other guides may be, as their inventors phrase it, "dropped in" afterwards, as soon as the correspondence under any one letter of the alphabet becomes so large as to need the presence of further guides in order to prevent loss of time in finding the individual files. In any case additional guides can always be inserted, so that the precise whereabouts of all the correspondence filed under *Ac*, for instance, may be seen at a glance without its being necessary to run through those beginning

with *Ab*. But one does not wish to be perpetually altering the arrangement even though the alteration be merely in the nature of a development of the original scheme ; and a complete equipment with all the guides likely to be required as the contents of the filing cabinets grow, is probably the most desirable in the long run.

In most businesses the correspondence files fill far more rapidly than any of the other files, and the necessity for a larger equipment when starting the alphabetical system will seldom exist as regards the files intended to hold matter other than correspondence. Therefore, it may reasonably be urged that the initial expense need not be much greater than that incurred on installing a numerical system.

Then it is argued in support of the alphabetic method that it is the only scheme which can be uniformly applied. Even the numerical system depends for its very possibility of employment upon the existence of an alphabetical arrangement—in the form of an index. The numerical system cannot dispense with alphabetical arrangement somewhere ; whereas the alphabetic system can very well dispense with all numerical assistance. Everything filed, no matter how numerous are the “ classes ” into which the filed matter is divided, is dealt with in one simple, uniform way, and can, therefore, be found without any preliminary search to ascertain where to look. Ackroyd’s place in all the files in which anything connected with him figures is identical. By merely knowing his name you know where to find whatever you may happen to require that concerns him or his transactions. Is not the advantage, demands the alphabetical enthusiast, altogether on the side of the alphabetical system ? The numerical system rests entirely on the non-numerical card. If a card should happen accidentally to get lost or mislaid, you are without the only key to the whereabouts of the papers you require. If, on the other hand, the alphabetical scheme be employed, the mere loss of a card will not interfere in the least with the immediate availability of anything filed.

As for the “ subject ” index, it is as easy to keep one under

this system as where a numerical arrangement is employed. The only difference is that on the "subject card" you will write the correspondent's name and date instead of the number of his correspondence file and the date. You are less likely to write a wrong name on a subject card than to write a wrong number.

As for the correlation of papers, this is no more difficult, where it is necessary, under the alphabetic system than under the numerical system. It is true that unless you employ a card index, you cannot tell without searching how many files there may be relating to one correspondent or to one transaction. But you can so easily ascertain by searching the files themselves, and the process of searching them is so simple, because you can always go to the right place without the least hesitation, that it is not necessary, for ordinary purposes, to have an index card with a list of the various files. While you are looking up the index card and making a note of the various file numbers under each class, you could be searching the class files themselves. And if you think it desirable for any reason to have a list of all the files which in any way concern a particular correspondent, you can contrive to provide yourself with that list as easily as when the numerical system is employed. You can write the names of the separate files on the card that you keep to serve the purpose of an address book and register of telephone numbers and telegraphic addresses. There is no difficulty at all about the matter. But once you have got into the habit of relying on your purely alphabetic method you will rely on it implicitly, and will never use extraneous aids, even though you may have provided yourself with them.

Even where it is important to assign two or more folders to one correspondent in the correspondence file, and to keep apart two or more sets of papers in other files, relating to dealings with him, the alphabetic system may still be retained. The chief purpose of this sub-division, where it takes place, is to keep quite distinct the papers relating to several separate unrelated transactions. In most such instances the nature

of each transaction is of a character that can be readily indicated by a simple designation which may be marked on the folder or on the papers. This designation will serve as a specific indication, and is, therefore, more helpful than the decimal addition recommended by users of the numerical system. If a designation can be entered on an index card so as to show to what precise matter a particular folder relates, it can be quite as easily written on the folder itself. Apart, however, from this method, it is possible to file Ackroyd's successive orders as *Ackroyd, a*; *Ackroyd, b*; *Ackroyd, c*, etc., and even if necessary to continue a second series as *Ackroyd, aa*; *Ackroyd, bb*; *Ackroyd, cc*, marking all the relevant papers in the same way. The order will show which files it will be necessary to consult for other papers concerning the same matter. The actual transaction to which each one of these relates can, of course, be shown by an appropriate memorandum or note on the customer's index card. It is possible, also, to employ numerals in place of these subsidiary letters, and thus to mark Ackroyd's successive orders, *Ackroyd, 1*; *Ackroyd, 2*; *Ackroyd, 3*, etc., assigning similar indications to the associated correspondence folders, and other filed papers, and making the necessary notes on the customer's index card.

In either case we preserve the simplicity of the alphabetical system; we avoid all complexity; our papers index themselves. We achieve the one object of a good filing system; we are able to find any papers we want without difficulty. In some cases an index card may help us, particularly where our transactions with any one person or firm are numerous. But, if necessary, we can dispense with even this help. We are not dependent on an outside index which, whether it be kept in a book or a series of books, or on cards, may get lost, mislaid, or accidentally destroyed. We are free from the danger of discovering that, through somebody's carelessness or neglect, a card which has been removed from the index file has not been returned, and cannot be found just when we want to know the numbers of the files concerning the

correspondent whose name appears on the card. We are saved from the consequent laborious search through a long series of papers arranged numerically. Our arrangement speaks for itself, explains itself, is not dependent on anything outside itself.

### **The Choice.**

It must be conceded that there is much to be said on both sides. Understanding and appreciating the peculiar advantages of each method for some purposes, one is obliged to point out that in the last resort, the choice made must depend upon the nature and extent and variety of the filing needs of the specific business concerned. Other things being equal, a self-indexing method has merits that speak loudly for its adoption. But for sheer consecutiveness of arrangement, for ease of sub-division and sub-classification, for completeness of cross-referencing, for correlation and co-ordination of records, a numerical system is of conspicuous value. After all, each system must be judged by the effectiveness with which it serves the purposes of the particular business to which it is applied.



## CHAPTER VI

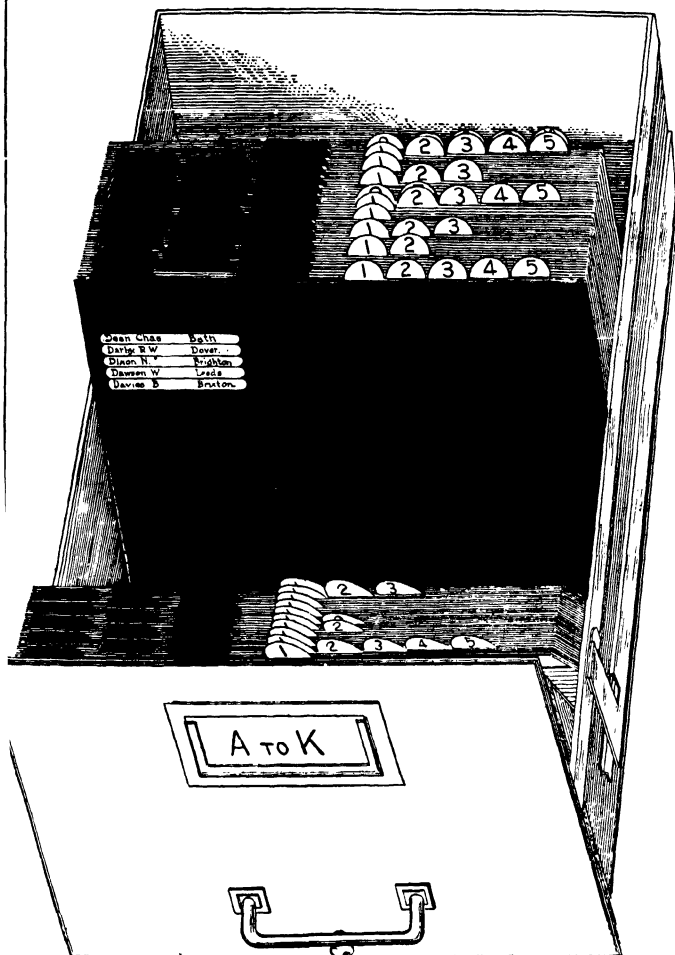
### ALPHABETICAL-NUMERICAL SYSTEMS

THERE are now on the market several filing systems which have been invented with the object of combining an alphabetic scheme of classification with a numerical arrangement. The methods by means of which the letters of the alphabet and numerals are utilized vary, and the purpose which each of them is made to serve is not identical. It is claimed by the inventors of these systems that they have succeeded in attaining in one system the respective separate advantages of both the alphabetical and the numerical methods of arrangement. Two further claims are urged on behalf of the alphabetic-numerical systems. First, it is said that those systems are self-indexing, and, therefore, self-sufficing—that they need no addition in the shape of a card-index or otherwise. Secondly, it is affirmed concerning every alphabetic-numerical system that it removes effectually all the difficulties which critics of purely alphabetic systems allege to be inherent in those systems, and also all the difficulties which the advocates of purely alphabetic systems allege to be inherent in any purely numerical system.

In view of these claims, it is worth while to consider briefly the methods employed in one or two of the alphabetic-numerical systems, to examine how they work, and what it is that each of them really succeeds in establishing.

It may be convenient to discuss, first, an alphabetic-numerical system which was early on the market, and which has achieved undoubted popularity. It represents an ingenious attempt to simplify the process of filing, and to facilitate the tasks of finding and consulting whatever records may have been filed.

The first question that arises is “ what is its actual basis ” ? The answer is not uncertain.





### **Its Basis Alphabetic.**

As soon as we begin to study the system we discover that its basis is alphabetic, though there is a sacrifice of some of that completeness of arrangement of which a purely alphabetic scheme is capable. Side by side and in conjunction with the alphabetic arrangement there is a numerical arrangement applied consistently throughout and applied simply as well as consistently. One hesitates to describe the numerical plan as subsidiary in this case: it is rather additional. But the paramount plan of arrangement is undoubtedly alphabetic, the numerical principle being introduced with the object of securing certain desirable advantages which can in any case, where a purely alphabetical arrangement is followed, only be attained by some supplementary device. A detailed description of the method will make this clear.

### **The Combined System.**

On opening one of the drawers of the filing cabinet, a drawer labelled with one section of the alphabet—say “A-K”—there become visible three sets of differently coloured guides and tabs. The colours are red, blue, and white.

First we notice on the left-hand side of the drawer two rows of red projecting guides, each of them indicating a small sub-division of the alphabet. The first of these may be labelled, say, “AA-AL”; a little further from the front and slightly to the right of this will be seen the second red guide, bearing the letters “AM-AZ.” The third, which is immediately behind the first will be labelled “BA-BH”; and the fourth which is immediately behind the second, will be labelled “BI-BQ.” This is the kind of thing we are familiar with in all alphabetic systems. But it will be noticed that each of our labelled red guides is not only lettered but is numbered as well, and that the numbers follow one another consecutively on all the red guides in the drawer. Thus the guide that bears on it the letters “AA-AL,” is numbered 1; the guide labelled “AM-AZ” bears on it the figure 2; guide “BA-BH” is numbered 3, and guide “BI-BQ” is numbered

4. And if we open the series of drawers employed for filing we shall find that the same plan is applied throughout the alphabet, and that the numbering is continuous from the first division of A to the last division of Z. What has been achieved up to this point by the introduction of figures is merely the numbering of the various sub-divisions of the alphabet.

From the description already given it will be understood that all the guides in the first row from the left bear odd numbers, these following each other in the ordinary serial order 1, 3, 5, 7, 9, etc., and that all the guides in the second row bear even numbers, these also following each other in the ordinary serial order, 2, 4, 6, 8, 10, etc. This numerical arrangement enables us to ascertain at a glance and without the careful examination and comparison of the alphabetic guides which would otherwise be necessary, whether every one of the guides that should be in the drawer is there, or whether any and which of them is absent. The utility of this will be evident from what follows.

Every one of the red guides is attached to a cardboard sheet rather larger than the folders in use. The sheet is ruled, and each line is numbered, the first number on every separate sheet being 1. The sheet contains spaces for as many names and addresses as there are numbers upon it. The names and addresses written or typed on this card represent the whole of the correspondents to whom in the particular sub-division of the alphabet indicated by the attached alphabetic guide, folders have been assigned. There is, therefore, a separate index for every sub-division of the alphabet. The actual arrangement of the entries on these index sheets will be explained and discussed later, when we come to consider the system in operation.

We see now that we have in each drawer a series of index sheets arranged in alphabetical order and numbered consecutively. If every number is visible we know that every index sheet is there. But, as we shall see later, this is not the only purpose which the numbers on the red guides serve.

The second series of guides that attract our attention is coloured blue. We notice that these, too, are numbered, and that the numbers run consecutively from 1 onwards. We notice, further, that each one of them is side by side with a red alphabetic guide bearing the same number. Thus guide "AA-AL 1" in red has for its neighbour a blue guide bearing the number 1 in red; guide "AM-AZ 2" has for its neighbour a blue guide bearing the number 2; and so on. Every one of these blue guides is attached to a blue folder intended to contain miscellaneous correspondence, that is to say, correspondence from customers or others whose letters are so few at present as not to warrant the allocation of a separate folder to any one of them. The scheme, therefore, involves as many "miscellaneous" folders as there are alphabetic sub-divisions in use.

Thirdly, on the right-hand side of the drawer, we see a quantity of small white tabs projecting, and we notice that these, too, are all numbered. But here we observe evidence of a new numerical scheme. We find that our white tabs are in sets, and that each separate set begins with number 1. Closer scrutiny reveals that there is a separate set for every one of the alphabetic sub-divisions indicated by the red guides.

The white tabs indicate the presence of folders containing letters from firms whose correspondence is unusually large. A customer originally allotted a place in the "red" division will be transferred to the "white" section if numerous letters from him render his folder exceptionally bulky.

### **The Scheme in Operation.**

The nature of the equipment is not difficult to understand. Let us now study the actual process of filing. For this purpose let it be supposed that the first half-dozen persons or firms to whom, after the system has been installed, we determine to assign folders are the following—

- |                    |                       |
|--------------------|-----------------------|
| (1) Dixon W. & Co. | (4) Abraham, E. & Co. |
| (2) Adams, James   | (5) Devine & Smith    |
| (3) Davies & Sons  | (6) Ackroyd & Watt    |

Let it be further supposed that it is in the order in which they are here set out that we actually do start folders for them. It may be objected that in real life the first six correspondents to be allotted folders would probably have names beginning with six different letters of the alphabet. But that is immaterial. This list, which, after all, is not an impossible one, is purposely confined to names beginning with two letters of the alphabet rather than with six, in order to draw attention to a little peculiarity of the system.

We shall deal with Dixon & Co. first. Among our alphabetic sub-divisions we shall find, let us say, "DA-DO." We shall then take a folder numbered 1, and assign it to Dixon & Co., marking their name on it. We shall enter Dixon & Co.'s name and address against number 1 on the "DA-DO" index sheet, and shall place the folder in its proper place in that division.

When we reach Davies & Sons, we shall allot to them a folder with a number 2 tab, and we shall enter their name and address on the same index sheet that contains the name of "Dixon, W. & Co.," but in the following line opposite to the number 2. Devine and Smith, when their turn comes, will have a folder numbered 3, and their name and address will be added opposite to number 3 in the third line of the same index sheet.

When we have disposed of our first correspondents—W. Dixon & Co.—we shall turn to the alphabetic sub-division "AA-AL," because our second correspondent is named Adams. His papers will be placed in a folder numbered 1, the "AA-AL" index sheet will receive an entry of the name "Adams, James," and the address of the firm. This entry will be against number 1 in the index sheet. E. Abraham & Co. will in due course take folder number 2 and be entered as item number 2 in the index; and Ackroyd and Watt, when their turn arrives, will be provided with folder number 3 and the third entry in the same index sheet.

By this time we shall have partly filled in two of our index

sheets. In one of them the names will appear in the following order—

- (1) Adams, James
- (2) Abraham, E. & Co.
- (3) Ackroyd & Watt

In the other the order will be

- (1) Dixon, W. & Co.
- (2) Davies & Sons
- (3) Devine & Smith

It will be noticed that there is no attempt to arrange the names in what in previous chapters has been styled the directory order. The exigencies of numerical arrangement preclude this. But it must be conceded that the arrangement of the names in the index sheets is not likely to occasion any inconvenience, or to involve any appreciable delay in searching, because each separate index list is confined to one small sub-division of the alphabet, and the total entries on it will in any instance be so few that practically any name required can be traced at a glance.

It is impossible to contest the claim that by this method papers can be easily filed and easily found. But there are other questions that present themselves, and it may be well to deal with some of these.

### **Notes on the System.**

It will be obvious that like all purely alphabetic systems this system requires a fairly complete equipment to start with. It may be so complete that separate guides are provided from the outset, as part of the scheme, for such common names as Brown and Smith, and that these take their proper consecutive numbers in the series of numbered alphabetic guides. In that case to keep to the general scheme there must be also miscellaneous folders for the miscellaneous or casual Browns and Smiths who are not yet important enough to be furnished with separate folders of their own. But whereas in a purely alphabetic system it is possible to introduce from time to time new and more minute alphabetic sub-divisions without



disturbing any existing arrangements, such changes can only be effected where this system is employed by some amount of interference with the simplicity of the numerical scheme. Suppose, for instance, that for some special reason your correspondents whose names begin with "Da" to "De" become so numerous that it is obviously desirable to sub-divide the division "Da-Do" with which you commenced, so as to make two sub-divisions—"Da-De" and "Df-Do." If your scheme is purely alphabetic, there is no difficulty about doing this. But if your division "Da-Do" is number 11, with a miscellaneous folder similarly numbered and an index sheet similarly marked, numbers 10 and 12 being already appropriated for the sub-divisions that respectively precede and follow, the desired further sub-division can only be effected by deviating from the simplicity of the numerical arrangement. We can, of course, substitute two new red guides with attached index sheets for the one originally labelled "Da-Do 11," and we can label our new guides "Da-De 11" and "Df-Do 11a." Or we can label them "Da-De 11.1" and "Df-Do 11.2"—a more desirable course because the guide marked "Da-De 11" does not by itself suggest the necessary existence of one marked "Df-Do 11a," and the temporary absence of the latter would not be immediately noticed, whereas a guide marked "11.1" indicates that it should be followed by one marked "11.2," since there would otherwise be no purpose in employing the decimal addition. And we can provide two miscellaneous folders similarly marked. But this will involve giving new numbers to all the correspondents whose papers were already filed under the original division "Da-Do," because to secure the advantage of being able to tell whether all the folders are on the file or whether any and which of them is missing, we must begin now with number 1 under each of our new sub-divisions. Furthermore, we should now need to indicate the fact of sub-division. This could easily be done by writing or typing on the new index sheet for "Da-De," a memorandum "Df-Do 11a (or 11.2) follows." Probably, in practice, we should adhere to the original arrangement and not introduce

further sub-divisions. Flexibility here means a little complexity.

Like all purely alphabetic systems starting with a complete equipment, this system will involve vacant spaces here and there, and is therefore less compact than a purely numerical arrangement.

### **Absent Folders.**

A further device for ensuring certainty as to whether any, and if any, which, of the folders which should be in a particular filing cabinet have been withdrawn and have not been returned, consists of a so-called "Absent Card." The card, which is prepared so as to stand in the file and project well above the upper surface, may be of a distinctive colour so as to be unmistakable. It has printed at its head in bold letters the word "Absent." The remainder of the card contains three divisions. In the first or left-hand column is to be written a short record of the date on which the card referred to was withdrawn. In the second or centre column is to be written the number of the folder withdrawn ; and in the third column is to be written the name or the initials of the member of the firm or of the staff by whom the withdrawal has been made. When any withdrawn folder is returned, the fact is indicated by striking through the relative entries on the "Absent Card."

This device fits in with and supplements the alphabetic-numerical scheme already described. Where a vigilant and conscientious filing clerk is entrusted with the sole control of the filing cabinets, and the clerk makes scrupulous and complete use of the "Absent Cards" by making and obliterating the entries as necessity arises, the indications will be perfect ; and the presence of the card in the appropriate cabinet will give everybody the needed information.

### **The Miscellaneous Folders.**

The blue folders in which are to be placed the correspondence from and to persons whose names fall within the

respective alphabetic divisions indicated, but whose letters are not numerous enough to warrant the allocation of a separate folder to every one of them, will serve a temporary purpose as regards some correspondents. Every such folder should contain a list of the names and addresses of all the correspondents whose letters it holds. As soon as any correspondent whose letters are there is elevated to the dignity of having a separate folder allocated to him, his name will be struck out of the list. A statement may be added giving the reference to his new place in the filing scheme. This, however, is not essential, because in the ordinary course the miscellaneous folder would not be resorted to until it had been ascertained that no separate folder existed bearing his name or number.

Another class of correspondent whose letters will find a place in one or other of the miscellaneous folders will never need a separate folder. In due course his letter or letters will be removed to a transfer volume or file. His name will then be struck out of the list. It is desirable that when this operation is performed the number or other title of the transfer volume or file in which the letter or letters will be placed under a similar alphabetic-numerical scheme, should be written against the name struck through, so that in the event of further correspondence (perhaps after a considerable lapse of time) necessitating reference to his former letters, they may be easily found.

For most businesses this simple plan will suffice and should work admirably. In complex businesses it may need special modifications to meet special circumstances. Where a "follow-up" system is part of the general machinery of the business, something more easily accessible will certainly be desirable. It is among the casual correspondents whose communications find their place in the "miscellaneous" folders that most of the inquirers will be found upon whom the "follow-up" system is to be brought into play. For that purpose it will be convenient to keep a separate list of them. The numerical-alphabetic scheme referred to does not dispense with the necessity for this separate list.

## **Supplementary Cabinets to Meet Special Circumstances.**

The general scheme is elastic enough to permit of its being added to in order to meet the special circumstances of special businesses. For instance, where the business is carried on with several or many branches, involving a large correspondence with headquarters, it may be desirable to keep that correspondence apart from the general correspondence with customers, manufacturers or suppliers of raw materials, etc. A separate Filing Cabinet or drawer will in that case be allocated to the Branches. The method already described may be followed, but there will be, of course, no miscellaneous folders. But the names of the branches will be written in alphabetical order on the "Guide card," which will occupy the front place in every drawer, and against each name the number of the relative folder. Thus the entries may run: "Birmingham No. 1," "Cardiff No. 2," "Derby No. 3," and so on. An alternative plan is to print or type the name of each branch on the projecting tab attached to the folder containing the correspondence with that branch.

What is here suggested so far as branches are concerned is, it is almost needless to point out, equally applicable where the business or a large part of it is transacted through several or many agencies.

## **Transfer Files.**

It is found in practice useful to keep with every file an indication of all the folders which have within a reasonable period of time been removed from it to a permanent place. The removal may have taken place because the transaction or transactions to which the transferred correspondence relates has been finally completed or because the correspondent has died, or because the correspondence has increased so greatly in bulk that it has become inconvenient to retain the whole of it within a single folder. The latter may well be the case where branches or agencies are concerned. There should be

no difficulty in ascertaining at a moment's notice where precisely the transferred correspondence is to be found. A "transfer record" of a distinctive colour, kept within every filing cabinet or drawer, is, therefore, useful. It should show the Tab No., or better still, the correspondent's name and Tab No., the dates of the first and of the last letter comprising the transferred correspondence, and the No. or other sufficiently precise indication of the transfer volume or Transfer File to which the transfer has been made. The arrangement of the transferred correspondence whether from "individual" folders or from "miscellaneous" folders, may be identical with that of the ordinary files. It is generally preferable—especially where an alphabetic-numerical scheme, intended to be self-sufficing, is adopted—that the scheme should be closely adhered to throughout. Transfer records can be obtained which make provision for entry of all the particulars suggested.

### **What the Scheme does not Accomplish.**

The scheme is self-sufficing up to a point, and it may be developed in various directions which it is impossible to describe or to discuss here and yet remain self-sufficing up to that point. In other words, for all the purposes for which it becomes necessary to refer for any purpose to any filed correspondence or other record—for, of course, the applicability of the scheme is not limited to correspondence, but may apply to anything else capable of being filed—the file contains and gives promptly all the information that is needed. So far, the claim that it is self-sufficing is amply justified. But it by no means follows that it renders unnecessary a Card Index or some equivalent record. It certainly does not dispense with the desirability of keeping an auxiliary and complete index of correspondents, customers, and others in order to send out circulars, catalogues, new price lists, etc. For this and for other purposes, such as the daily addressing of letters, the dispatch of telegrams, communications by telephone, etc., the separate card-index with name

and address, telegraphic address, telephone number, and other particulars, will be found of great practical use as a supplement to the system. We may say, therefore, that although the system is self-indexing it is not for all the purposes of business entirely self-supporting. Its co-ordinated utilisation of alphabetic sub-divisions, numbers and colour in one combined system is interesting as an illustration of the possibilities of such combinations—possibilities which it cannot be said to exhaust. It can be employed on the plan referred to in an earlier chapter as the “file-everything-on-a-single-file” method. For a business of a simple compact description it should serve satisfactorily enough. Complexity and expansion of the business would probably bring with them the necessity of introducing modifications into the filing scheme, of making enlargements in one direction, sub-classifications here and there, and new indexing arrangements for subsidiary purposes; and it would also probably involve the further necessity of supplementing the scheme by additional appliances. But a little ingenuity would enable these objects to be accomplished without any actual departure from the fundamental principle on which the system is based.

### **Another Alphabetical-Numerical Scheme.**

Another scheme now on the market is styled by its inventor “The Alpha-Merical System.” It is claimed for it that it enables the separate index to be entirely dispensed with, that it provides an effectual numerical check against misfiling, indicates at a glance the absence of any file which may happen to have been withdrawn, and has not yet been returned, and that it is self-sufficing and enables the best results to be secured with a minimum of labour.

The drawer in which the folders are filed contains three divisions. The first division, which occupies the left-hand portion of the drawer, contains what are termed the “Alphabetical Index Guides.” For economy of space, these are

arranged in two positions, the first row (to the extreme left of the drawer) comprising the indexes to A, Be, Br, Ca-ce, Cr-Cz, and Di-dy, and the second row (immediately to the right of the former set) comprising the indexes to Ba, Bi-bo, Bu-by, Ch-co, Da-de, and E. Each of these guides indicates the presence of a card on which are written or typed the names of all correspondents to whom a special folder has been assigned under the particular alphabetic division concerned. Each of the index guides is numbered, that marked A being numbered 1, that marked B being numbered 2, and so on. On pulling out the drawer, we see that the index-guides reading from the front backwards, run as follows—1, 3, 5, 7, 9, 11 in the row on the extreme left and 2, 4, 6, 8, 10, 12 in the row immediately adjoining it on the right in the same division. The same method is followed in all additional drawers dealing with further divisions of the alphabet.

It will be already evident that the basis of the system is alphabetic and that figures are resorted to as a means of numbering not the individual correspondents whose papers are on the file, but the successive selected divisions of the alphabet.

A second set of tabs is visible in the centre. These are blue, and bear upon them the same letters and numbers as those in the first position parallel to which they are arranged. They are attached to blue folders supplied for the purpose of containing miscellaneous correspondence—*i.e.*, correspondence from and to persons to whom there is not yet enough material to file to warrant allotting a separate folder to each of them. In this way the correspondence with all miscellaneous correspondents whose names begin with A will be filed in the blue-tabbed miscellaneous folder marked A.1., and that with persons whose names begin with Ba will take its place in the similar folder marked Ba 2, and so on.

To the right of this, and occupying the remainder of the drawer, are the folders assigned to individual correspondents. Each folder bears, written or typed, on its projecting tab a number indicating to which division of the alphabet the

correspondent belongs, and also the correspondent's name. Both name and number are visible immediately the drawer is opened.

As this Filing scheme contemplates the placing of the miscellaneous folders and the individual correspondents' folders in a straight line with the corresponding Alphabetical Index Guides, all the folders assigned to individual correspondents whose names begin with A will take the front places, two of them occupying the front row, and any others being ranged in two's behind them. No matter how many folders may be used under division A, all of them will bear the number 1. This one visible tab may bear the inscription "1. Abel, W. & Co.," another may announce "1. Adams, J. W.," and a third may be "1. Armfield, Ltd." To find out how many individual folders there should be on the file in the division comprising the letter A, you must have resort to the adjoining Index under that letter, in the same drawer.

What is true of A is true of all the other alphabetic divisions.

The several Index-Guides should contain the names of all firms, companies and individuals to whom separate folders have been assigned, a new name being added whenever a new folder has been allotted, and being struck through whenever the folder has been withdrawn to the transfer file. To ascertain whether any folder which should be on the file is actually there or not the relative index must be consulted. The response will be immediate and accurate. Removal to a transfer file can be effected easily, the folders being removed and arranged according to a similar plan on the transfer file.

### **Notes on the System.**

Very much the same comments as have been made on the earlier alphabetic-numerical method, are applicable to this. Both are self-sufficing in the same sense ; but neither of them dispenses with the need for a card-index for other indispensable office purposes.



**Other Variations.**

Other variations are exhibited by other schemes now on the market. The combination of numerical and alphabetic arrangement permits of so many deviations and of so many developments in various directions that it is not surprising that it is growing rapidly in popularity. It is capable of adaptation to businesses of all descriptions, large and small, simple and complex. It is quite safe to say that more alphabetic-numerical schemes will make their appearance, and that some of them will probably be excellent.

## CHAPTER VII

### SUBSIDIARY AND SUPPLEMENTAL CLASSIFICATIONS

It will be recognized by the reader of varied business experience that the methods of classification discussed in previous chapters are far from covering the entire ground. In the main, it is true, we must employ an alphabetical method throughout, a numerical method throughout combined with a complete alphabetical index, or a mixture of both. But there are necessities, arising out of the nature of particular businesses, which make certain subsidiary classifications desirable.

A few illustrations will show how these may be provided.

#### **Group Classification.**

In many businesses what may be roughly termed "group classification" may serve various useful purposes. The simplest form of commercial enterprise is that of the middleman who deals in a single article or in one class of goods only. In order to present the facts in the least complex manner possible, let it be assumed for the moment that our middleman is able to carry on his business without the assistance of travellers, either because he has a monopoly and is well known in the trade, or because he prefers to rely upon newspaper advertisement for securing that publicity upon which the sale of his special goods depends. Even in these circumstances there will be at least three classes of persons from whom he will receive and to whom he will send communications, and concerning whom he will find it necessary to make and preserve certain records. There will be, first of all, the manufacturers from whom he purchases the goods which he sells to others. Secondly, there will be the customers to whom he actually sells. Thirdly, there will always be a certain number of people who have made inquiries with reference to his goods but who have not yet become actual customers.

They are potential customers of whom it will not be wise to lose sight—people who may, with advantage, be looked after, circularised a few times, perhaps called upon. These three classes of correspondents naturally group themselves separately, and it becomes a question how far it is desirable in any particular instance, that the natural grouping should be reflected in the details of the system of classification employed in the business. It is perfectly feasible to keep together under names or under successive numbers all the members of our three groups of manufacturers, customers, and inquirers. In a small business that would be the normal course. The exercise of a fairly good memory would prevent any very considerable waste of time occurring as the result of the adoption of that course. Yet even in a small business there will necessarily be occasions when some easy and simple method of readily distinguishing between the persons who comprise each one of three classes named, would be of signal value. It may be desired to send a new catalogue, a new price list, or a circular calling attention to some change determined upon or contemplated in the size, shape, weight, appearance, or quality of the goods supplied, some new arrangement as to delivery of the goods, some alteration of terms, and so on. To give effect to such a desire it is obviously essential that there should be no hesitation in selecting the particular persons to whom the catalogue, price list, or circular, is to be sent, no danger of omitting any of those persons, and no danger of sending to any other persons.

To ensure these results in such a way as to realise the great object which all modern filing systems have in view, namely, that of getting through each single business process with the least possible expenditure of energy and time, some grouping scheme seems necessary. This means a subsidiary classification. Several methods are capable of employment for the purpose intended. In a small business, the addition of a capital C to every file mark may indicate "customer"; a similar addition of M may indicate "manufacturer"; and I may reveal an "inquirer." The addition may be made on

every folder used ; it may be noted on everything filed ; it may be marked on every index card ; and it can be utilized in connection with either an alphabetic or a numerical scheme of classification. Or the distinction may be shown by the use of different colours. A white folder may indicate a customer, a buff folder a manufacturer, and a green folder may be used for inquirers. Similar differences of colour may of course be utilized for the relative index cards.

These devices, however, represent the most rudimentary type of group arrangement. They will serve in a small simple business of the kind indicated because in such a business there will be but one comparatively large class, the customers. The manufacturers will be few, and the inquirers who remain mere inquirers will probably not at any time be numerous. But even for the purposes of a very simple business, this method of grouping will develop unsatisfactory features as the transactions and the number of persons and firms with whom the transactions take place multiply. A more efficient method of grouping will then become indispensable. By this time the business will have become more or less completely "departmentalized." There will be a buying department, a selling department, and a department for dealing with inquiries. It will save everybody's time if the three groups of records and papers are classified separately. They may be, and indeed they should be, all classified on one fundamental principle. If the alphabetical method be adopted in one department or for one group, it should be adopted for all. If, on the other hand, the numerical method be chosen, it should be employed all through. But the items of each of the separate groups will never be mixed. Each can be consulted and used without the others.

### **The Colour Distinction.**

This complete division into separate groups, the nature of each group being indicated by appropriate labels affixed to the drawers or cabinets, does not need any further distinction. Nevertheless for various reasons a distinction by means of

colour will be found useful. A difference of colour will indicate at a glance to which of the three groups the folder or the card belongs, and will prevent it, when it has been withdrawn for use, from being deposited in the wrong receptacle ; or if by mischance it should happen to be placed inadvertently in a wrong receptacle, the alien colour will proclaim the blunder and call aloud for the instant correction of the error.

It is possible, however, to apply this principle of differentiation by colour, too extensively. It should never be adopted hastily, nor should it be employed except where broad distinctions are desired to be preserved. The distinction between a manufacturer and a customer is clear, and it is important. Only in rare instances in a simple business such as has been referred to, will a manufacturer and a customer ever change places. But an inquirer may become a customer. In many cases he does. Wherever this happens it will, of course, be necessary to transfer his records and papers from the inquirer-group to the customer-group. Is it, it may be asked, desirable to utilize differences of colour to distinguish between such exchangeable classes as inquirers and customers ?

The correspondence with each individual inquirer is, as a rule, too small to warrant the provision of a separate folder. In the drawer labelled " Inquirers," the letters may be grouped under the letters of the alphabet, sub-divided, where necessary, on the *ab*, *ac*, *ad* plan. As regards many of the alphabetic divisions, the correspondence which it will be necessary to retain and to classify at any one time in the folders assigned to mere inquirers will not be numerous enough to call for any sub-division of that kind. A simple alphabetic arrangement will generally suffice.

Where this method is followed the transformation of an " inquirer " into a " customer " will necessarily entail the provision of a new folder. But the utility of grouping the two classes separately is undeniable ; and while any of them remain mere inquirers, the colour distinction<sup>v</sup> affords an unmistakable help in the tasks of classification and reference.

Distinction by means of colour is capable of serving many different purposes. Wherever classification of records necessarily filed separately becomes advantageous, differences of colour may be utilized. Two general schemes suggested by one file-manufacturing company will serve to suggest other applications of the principle.

In the first instance six colours are employed, and they are made to serve a purely geographical purpose. Thus the colour grey indicates transactions with customers or with agencies or branches in London ; blue affords a similar indication relating to the provinces ; red to Scotland ; orange to Europe outside the British Isles ; buff to the Colonies ; and green to Ireland. This arrangement may be varied to any extent that may fit in with the peculiarities of any special business. Thus, the colour grey may be made to stand for the British Isles ; blue for China ; red for South Africa ; orange for Australia and New Zealand ; buff for India ; and green for Canada. There may be businesses in which this classification would be useful. Geographical arrangement by means of a colour scheme lends itself readily to variation. And there is no reason why six colours only should be used. A dozen or twenty colour-distinctions may be helpful for the purposes of certain businesses.

The second scheme suggested by the file-manufacturing firm already referred to represents another form of classification. Grey is now applied to customers ; blue becomes an indication of "suppliers," *i.e.*, persons from whom the firm purchases raw materials, manufactured goods, tools, machinery and appliances ; red stands for agents, orange for shippers, buff for railway companies, and green for branches. This scheme is, of course, capable of many variations, extensions, and sub-divisions, and may be adapted in such a way as to meet the needs of businesses of great variety.

Where, as occurs in connection with some of the modern costings schemes, records made in various departments have to be assembled before the final figures can be worked out, the records themselves may be made on loose-sheets identical

in size, but varying in colour, so that each distinctive colour will indicate the precise department in which the separate record was kept. It will then be easy to see whether all the records are present which ought to be there, and if any one happens to be absent, a glance will enable that fact to be instantly detected, and will also tell which record it is that is missing, and which is the department from which it is to be sought.

These represent a few only of the many forms of classification to which a colour scheme of grouping may be usefully applied.

### **Grouping in More Complex Businesses.**

So far the problem of grouping has been considered in one very simple type of business. We have only to suppose our middleman's trade undergoing a slight development to see a further necessity for grouping. The one article or the one class of goods in which he has dealt hitherto may be made entirely in this country. The time arrives when he determines to add another article or another class of goods made abroad. He will now be dealing with two groups of manufacturers, and possibly also with two quite distinct groups of customers, for the people to whom he formerly sold, or the majority of them, may have no use for the article or the goods that come from abroad. Our middleman, if he be a good man of business, will want to keep the transactions in the English-made goods and in the foreign-made goods distinct, so that there will be no difficulty in ascertaining whether both branches of the business are profitable, whether they are equally profitable, or whether either of them is involving him in a loss. And at intervals there will be catalogues, circulars, "form letters," and other special communications that he will desire to send to one set of customers and not to the other set. For these and other purposes he will find it useful to classify his manufacturers and his customers by groups.

### **Grouping in a House Agent's Business.**

But there is another type of agent whose requirements it is worth while to consider. A man who carries on business

as an auctioneer, a house agent and rent collector, will find some well-thought-out plan of grouping very desirable. He has permanent clients and many temporary clients. He may have several transactions proceeding simultaneously on behalf of a single client. It will, it need hardly be pointed out, be desirable to keep the correspondence and other papers relating to each transaction apart from those relating to every other transaction on behalf of the same client. There will in many instances be a preliminary stage in which this method may safely be dispensed with, a period in which it may be very doubtful whether the contemplated transaction will proceed at all. A single folder under the client's name only may contain communications relating to such of his business generally as does not reach sufficient magnitude to warrant the devotion to it of a separate "subject" folder. As soon as the papers with reference to any one transaction become numerous enough they should be transferred from the "general" folder to a separate folder. John Smith, let us suppose, is endeavouring to sell a house, No. 196 Cambridge Crescent, by private treaty. The special folder will be given up entirely to the papers bearing on that transaction. All letters about it, from whomsoever they may come, should be filed in that folder; and there may be a few miscellaneous papers that can be conveniently filed with them. Many of the letters will be from casual inquirers, who have never been heard from before and who will never be heard from again. There is no necessity to go through the formality of providing separate folders for each one of these, or for filling up a card for them, or giving them a number.

In such a business there will be many letters which it would be folly to preserve permanently. A separate set of folders (one for each letter of the alphabet), permitting the temporary arrangement of temporary correspondence in alphabetical order, will be desirable. Once in three months these can be gone through and a large part of the letters destroyed.

These illustrations will serve the purpose of drawing attention to some of the peculiar features of an auctioneer



and house agent's business. There are other features which it would be interesting to trace. But we are here concerned specially with the problem of grouping office records. The auctioneer will be brought into contact with several classes of people whose names and addresses it will be advantageous for him to keep quite distinct. He will become associated with a number of people who make a business of buying building land ; and another class who buy nothing but ground rents ; with a third set of people who habitually buy small house property ; and with a fourth set who buy shop property only. Some of these will buy property in one locality but in no other. It will be particularly useful for him to keep a complete classified list of these. As the list will not be as a rule a very long one, he may be recommended to keep a special set of cards for buyers, mentioning on each card the kind of property that appeals to the person named upon it. Then when he has property for sale he will be able, by merely consulting this one set of cards, to dispatch particulars to all the people who are likely to be prepared to consider the possibility of purchasing, and to none others. The set of cards arranged in alphabetical order can be kept in one drawer appropriately labelled.

Then he will have another group of " clients " consisting of persons who have money which they are prepared to lend on mortgage of land or house property. These should be separately classified with a view to expeditious reference to them. Each card belonging to this group will contain the name and address of the " capitalist," the amount he has available, the class of property he prefers, the rate of interest he expects, for what term he is prepared to make the loan, and other relevant particulars. A separate drawer, or a separate section of a drawer, will be allotted to this set of cards, which will be kept together and, of course, arranged in alphabetical order.

There will be other groupings in connection with such a business. There will be a group of people who are seeking houses to live in and whose requirements as regards situation,

neighbourhood, number of rooms, rent they are prepared to pay, and so on, will be recorded on cards always available immediately for reference. And there will be another group which will have a sort of geographical arrangement—with, of course, alphabetical sub-divisions—consisting of lists of properties to be let, with all necessary particulars which an applicant is likely to require.

The three classes, "buyers," "prospective tenants," and "lenders," may, in most instances, be sufficiently classified by cards, with separate "class guides," kept in a single drawer.

### **Subsidiary Classifications Generally.**

It would be easy to multiply illustrations showing the value of special "groupings" for the purposes of various businesses. To do so, however, would unduly lengthen the present chapter. It will be seen that in the requirements which make the suggested groupings desirable there is nothing that need give rise to difficulty in working a simple and consistent filing system. Every special "grouping" desired to meet any special purpose in connection with any single business may be planned so as to harmonise with the general method of classification determined upon, and may be developed and maintained along the lines of that general method. It is pre-eminently desirable that it should in every case follow that method. There will then be unity of plan throughout the establishment. The special groupings are not in any sense rivals of any general method: they are simply additional, subsidiary and supplemental schemes, conducive to purposes incidental to the business.

One other necessity that in certain forms of business calls for a special grouping of a kind unlike any of those referred to so far may be briefly indicated.

### **Classification by Date.**

In most businesses there are things that have to be done periodically at fixed intervals, sometimes on fixed dates.

In certain forms of business these are numerous. Our house-agent, for instance, will probably be entrusted with the management of property on behalf of various clients. He will have rents to collect. Where these are payable weekly, the customary methods of checking and recording the payments are effectual. The very frequency with which the amounts are called for by the collecting clerk makes any special reminder unnecessary. But in the case of rents payable quarterly the circumstances are different. A simple system that shall ensure application being made at the right time to every person from whom rent is to be received is essential.

A good plan is to keep a set of record cards, each card containing the name and address of one rent-payer, the designation of the property in respect of which he is liable for rent, the amount of his annual rent, particulars of additional payments, if any, to be made by him, a money column in which each payment will be entered as it is received, and two other columns, one stating shortly the due date, and the other the date of payment. Each card will also bear on it the name of the client on whose behalf the rent is collected. These cards, if not too numerous, can all be kept in a single drawer, guide cards being provided labelled "Lady Day," "Midsummer," "Michaelmas," and "Christmas," or with such other quarterly descriptions as prevail locally. At Lady Day application will be made to all the persons named on the quarterly cards which happen to have been arranged under that "day." As soon as payment is received from any one of them the fact will be noted on his card, which will then be removed from the "Lady Day" set and placed with the "Midsummer" collection, ready for similar use in the following quarter. So long as any cards remain classified under "Lady Day," it will be known that they represent arrears of unpaid rent. Further applications will be made to the persons so in arrear on fixed dates in accordance with the practice of the office, and if necessary other steps will be taken for recovery of the amount. Not until every one of the tenants has paid

his Lady-Day rent, will there cease to be any cards grouped together for that quarter. The same process will be gone through in every successive quarter.

As to the arrangement of the quarterly cards among themselves. There is a temptation to group together the tenants of a particular client, arranging them alphabetically under the tenants' names. However useful such a scheme may be for book-keeping purposes, it is really not necessary for the purposes of collection and reference. As each amount is received it will be credited to the client's account and will thus classify itself sufficiently so far as the client is concerned. A simple alphabetical classification of all the people from whom the house agent is to receive rent will serve quite effectually for all the stages preceding payment. The accounts will show at any moment which of the tenants of any particular client have paid for the current quarter. The alphabetical cards grouped under that quarter will show which of all the client's tenants have not paid on any given date.

The house-agent will also have periodical payments to make in respect of the property entrusted to his management. Some of it will probably be leasehold, and there will be ground rents to pay. In many instances ground rents are payable half-yearly: in some cases freeholders require them to be paid once a quarter. There will be fire insurance premiums to pay once a year on various properties. And there may be rates and taxes, also payable periodically, where these are not paid by the tenants. And there may be mortgages on some of the property, the interest on which, becoming due quarterly or half-yearly, the house-agent is required to disburse out of receipts in respect of the property. For all these matters there is no better arrangement than that of a set of cards, classified by date. The cards may be arranged on the same plan that has already been recommended with regard to quarterly receipts of rent from tenants. The cards referring to ground rent payable will contain the name and address of the person to whom the ground rent is to be paid, and will

mention the amount of the ground rent, when it is payable, in respect of what property it is payable, and on whose behalf it is payable. A column will be available for entry of the short dates of each of the successive payments, and when these entries are made on a card, the card will be transferred to its proper place among the set of cards arranged under the date on which the next payment will become due. A similar scheme will serve for the cards relating to insurance premiums, rates and taxes, and interest on mortgages. Every card relating to fire insurance premiums should show on it not only the name of the office to which the premium is payable, and the property which it concerns, and the client on whose behalf the premium becomes due, but also the number of the policy. This is important because most insurance companies in sending out their periodical notices of application give no information as to the property which the premium covers, but confine themselves to mentioning merely the number of the policy. If the number be on every relevant card, it will be easy to check the notices as they come to hand.

In all these matters the purely alphabetical classification of the "periodical" cards is desirable. If all the cards recording, say, the Lady Day premiums payable to a single office be grouped together, it will be an easy matter to ascertain the total sum payable to that office in that quarter and to draw one cheque for the whole sum.

The receipts which will reach the house-agent in respect of the various payments that he has to make on account of property which he manages for others, will of course be arranged and filed under the names of the respective clients against whom the several payments are chargeable. All receipts on one client's account should be filed together in order of date, so that they will be in exactly the same order as that in which the items will appear in the account ultimately rendered to the client—a method of arrangement which will facilitate the verification and audit of the account wherever verification or audit may be necessary.

### **Orders, Costing, and Factory Systems.**

A volume might be written on this branch of the subject ; and it might easily grow into a large volume.

Where an order received can be promptly executed by the immediate despatch of the goods ordered, a simple plan will suffice. Where the execution of the order involves a number of manufacturing or other processes, perhaps in several departments organized and controlled independently of one another, more complex methods are necessary. On the one hand it will be desirable that at headquarters the order shall not be forgotten or overlooked, and that the stage which the necessary operations have reached at any given time can be readily ascertained. On the other hand, every department will need a record showing the exact details with which it is to concern itself, and the extent to which its share of the processes involved have been completed or how far its share of the work has progressed. It is desirable in most instances that at the close of every transaction these records should be brought together and filed with the other records relating to the transaction. There is, of course, difference of opinion as well as difference of practice on this point, and in view of the varying conditions of different types of business he would be rash who should venture to dogmatize on the subject.

But clearly all the records relating to a single transaction should bear upon them an indication that will enable the fact that they do relate to the same transaction to be seen at a glance, and they should be filed in such a way that there will never be any difficulty or delay in referring to any of them.

Where office and factory or other works are situate at a distance from each other, it may be useful to have a duplicate made of every factory or works record, and forwarded to the office to be filed with the other papers relating to the transaction. The general filing number or name or other indication of the whereabouts of the principal file should be repeated at the top of every record. Loose sheets, ruled specially to permit the required particulars to be inserted in such a way

that they may be seen at a glance, are, as a rule, desirable for this purpose ; and they should be uniform in size.

Similar remarks apply to the various Costings Systems that have been so extensively developed and adopted within recent years, and to factory systems generally. The importance of co-ordinating all records, of adopting a uniform filing scheme for them all, of preparing and keeping all records in such form, shape and size as to facilitate filing, and of indexing them in such a manner that the relationship of every individual record relating to any one transaction or any one customer with every other record relating to the same transaction or the same customer will be obvious, should never be overlooked.

## CHAPTER VIII

### SUBSIDIARY NUMERICAL SCHEMES

THERE are certain ways in which the device of numbering may usefully be employed in connection with all filing systems. Where a numerical scheme of filing is adopted every paper, before filing, should have written on it the number of the file in which it is to be placed. If a paper be afterwards removed for temporary use, the file number on its face will show at a glance to which folder it is to be returned, and there will be no necessity for any search to ascertain the fact. But apart from this practice, and where it is not followed equally with where it is followed, and whether the main filing scheme be alphabetical or numerical, or a combination of both, it is advantageous to introduce the plan of numbering the individual papers consecutively. For instance, if we have a separate folder for the correspondence to and from William Adams, either under sub-division "Ad" in an alphabetic filing system, or under say number 295 in a numerical filing system, we can mark in red ink in a conspicuous place—say the top right-hand corner—on the first letter placed on his file the number "1." On the copy of the reply sent to that letter we shall mark in a precisely similar manner the number "2." The next letter will take the number "3," and so on, while the file remains in use. The filing clerk should be required to add the number in every case before filing a letter or a copy of a letter. The plan can of course be applied to all documents where other papers are filed in their order along with the correspondence.

There are some merits about this practice which should lead to a more general adoption of it than has hitherto taken place. The serial number will fix once for all the place of



This applies to manufacturing businesses where the articles made are of one type—printing machines, typewriters, or other more or less bulky and special form of goods. It is the practice to number each machine and to keep a record of the destination of each one of them. It is important that in this record, however it may happen to be kept, whether in a book or on cards, the numbers should follow one another consecutively. And it is certainly desirable that a uniform method should be followed throughout the business. Suppose, for instance, that I am a manufacturer and seller of typewriters. As they leave the factory a record will be kept of the numbers on all the machines that form a separate consignment to any particular branch. Each branch will keep its own record of the machines received, and as each one of them is separately disposed of, will enter on a card the particulars of the sale. The card will record the number of the machine, the name and address of the purchaser, the date of sale, the price charged, the discount, if any, allowed, and such other details as may be thought necessary. If there be any papers on the general file relating to the transaction the card will contain a "cross-reference" to them. It may therefore be worked equally well with a system that is primarily alphabetical or one that is primarily numerical. If the particular machine should come back for "repairs," a record of that fact, with the date and the name and address of the person from whom it was so received for repair, should be made on the card. A separate card for every machine sold, kept in numerical order, each individual card bearing the number which the machine bears, may be useful subsequently for a variety of purposes. Sometimes the machine will be brought back to be exchanged for a later style of machine, and the question will arise what allowance ought to be made for it. By turning up the card it will be possible to ascertain instantaneously exactly how long the machine has been in use, what was the precise sum paid for it in the first instance, whether it has been returned for repairs, and so on—facts that may have an important bearing on the question of the amount to be allowed for it

that they may be seen at a glance, are, as a rule, desirable for this purpose ; and they should be uniform in size.

Similar remarks apply to the various Costings Systems that have been so extensively developed and adopted within recent years, and to factory systems generally. The importance of co-ordinating all records, of adopting a uniform filing scheme for them all, of preparing and keeping all records in such form, shape and size as to facilitate filing, and of indexing them in such a manner that the relationship of every individual record relating to any one transaction or any one customer with every other record relating to the same transaction or the same customer will be obvious, should never be overlooked.

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There are some merits about this practice which should lead to a more general adoption of it than has hitherto taken place. The serial number will fix once for all the place of

on the purchase of a newer type of machine. And then machines get stolen or become for other reasons the subject of inquiry by the police or on behalf of litigants. In all such cases the numerical record of previous transactions available at a moment's notice will serve important purposes. There will necessarily be an entry under the customer's name of the financial part of the transaction, if only in a ledger. If the rule be adopted of always including the number of the machine as part of that entry, there will be available two helps to tracing a past transaction, so that if the customer's name be known and the number of the machine he bought be unknown, the latter can be instantly ascertained ; and if, on the other hand, all that is remembered or known is the number of the machine, that fact will enable the customer's name to be instantly discovered. If it is not known by the inquirer from which particular office or branch the machine was actually purchased, reference to the head office records will show at once to which branch it was dispatched, and the branch records will then be available for the further information required.

## CHAPTER IX

### TEMPORARY CLASSIFICATION

ONE advantage of a definite, simple, and intelligible filing system is that it enables office desks and tables to be kept free from accumulations of papers, diminishes the number of pigeon-holes in use, and renders unnecessary the other miscellaneous receptacles that cumbered the old-fashioned business office. When the cost of a modern equipment for filing purposes is under consideration, the saving effected in these directions should not be overlooked. The object of the man who loves order and who has a partiality for a tidy office, will be to get his correspondence filed as quickly as possible. But there will always be a certain number of letters and other communications that have to be attended to. There will, of course, be the letters that have arrived by the morning's post, letters which the orderly man answers, as far as it is possible to do so, on the day of their arrival. And there will be letters received on previous days which have necessarily had to remain unanswered.

#### **The Day's Correspondence.**

Let us take the normal routine of a business house. In the morning a large number of letters have arrived. They are opened, deprived of their envelopes, and laid flat ready for perusal. It is very desirable that each one of them should be promptly stamped or marked with the date of receipt. Various kinds of date stamps can be purchased that will serve the purpose. This plan of stating on each incoming letter the date of its arrival is important. There will always be a certain percentage of letters which are wrongly dated—dated a day before or a day after the actual date on which they were written. A letter actually written in "May" will come with "April" written as part of the date. At the

beginning of a new year the habit of writing the previous year's number is not successfully shaken off for a few days, and at that time letters always arrive dated an entire year before they were actually written. And there will be letters which are undated or only partially dated. Apart from these errors—which occur more frequently than those who have not made it their business to look for them would suspect—there is the fact that sometimes a letter written on one day and dated on that day is kept back for some reason or other, and is not posted till the following day or even later, and is then sent off without any alteration of date. In some instances a great deal may turn on the date on which a particular communication came to hand, and the ability to prove that date may become important. In the not impossible event of litigation resulting, success or defeat in court may depend upon whether some step which should have been taken was or was not taken within a certain time after the arrival of the information contained in a wrongly-dated letter. And in any case it is always desirable that one should be in a position to say quite positively on what precise date every letter actually reached the office.

At this point two suggestions may perhaps be usefully interpolated. Where a letter has evidently been delayed, the post mark on the envelope may become valuable as proof that the delay occurred before the letter was posted, and that therefore it was due to the action of the writer of the letter or that of some member of his staff. It is therefore a good plan in such instances to preserve the envelope and attach it to the letter. Another precaution, easily taken, may be recommended. Whether the letter calls for a reply or not, it should be acknowledged in such a way as to draw attention to the interval between its date and the date of its arrival. “Your letter dated the 16th inst., reached us this morning,” or “Your letter dated the 16th inst., which, however, does not appear to have been posted till the 18th inst., reached us this morning,” will serve the double purpose of putting the date of arrival on record in such a manner as to make subsequent

dispute on the point practically impossible, and of drawing the correspondent's notice expressly to the fact—of which possibly he may be unaware—that there has been delay on the part of somebody in his office.

To return from our digression. The morning's letters have been opened and stamped with the date of their arrival. Except in very small businesses where the whole of the correspondence is dealt with by the principal, the next step will be to "sort out" the letters so that each one of them shall come under the notice of the particular person whose duty it happens to be to attend to it. Certain of the letters it will be necessary to send to special departments for inquiry before any reply is attempted or even considered. Others will be handed direct to certain members of the staff for immediate answer. Some will be put aside for consideration, for reference to price lists, catalogues, tenders, contracts, previous correspondence or other papers. A further batch will stand over pending consultation with a partner, a manager, or some other member of the staff, to enable the form or the character of the reply to be discussed and determined upon. A further section of the letters will be capable of immediate reply, and these, of course, will be kept together until the replies have been dictated, typed, signed, and dispatched. There will be a certain proportion of the letters which, being themselves in the nature of answers to previous communications, will not call for any reply, and these may be filed straightway. A certain number will need nothing more than a formal acknowledgment. And there will be the usual assortment of irrelevant circulars disguised as letters, which, having nothing to do with the business, will find their way promptly to the waste-paper basket.

The problem is "How shall each morning's mail be dealt with so that every communication needing reply shall be properly replied to in due course, and so that all steps consequent upon any one letter shall be attended to on the right day and shall not be forgotten, while at the same time the office table shall not be littered with unanswered epistles?" A

frantic passion for hustling everything out of sight by placing it in its permanent place on a file at the earliest possible moment will prove the reverse of helpful if the result be that, from lack of other suitable arrangements, something that needs doing is, by reason of the very promptitude of the filing, overlooked when the time arrives for it to be done.

At intervals during the day the morning's mail is supplemented by further batches of letters, which, of course, have to be dealt with in a similar manner and which give rise to similar questions. Shall the hour of arrival be marked on these? A few firms make it a practice to mark the hour of arrival as well as the date of arrival on all letters. In most instances this is unnecessary. But there are cases in which an indication of the kind will be useful. For example, a letter arrives just before closing time which can only be disposed of satisfactorily by some process that could not possibly be completed during the remainder of that day's business hours. The letter has perforce to stand over till the ensuing morning. It may be worth while, whenever this occurs, to write on the letter the exact hour at which it came to hand, as an indication of the reason for the apparent delay in replying to it.

Sometimes two or more letters will arrive from a single correspondent on a single day with reference to the same matter of business. Merely stamping the date of receipt upon each one of these communications will not show the order in which they reached you. That they may be respectively filed in their proper order and that there may be no question at any later date as to the actual order in which they were written, it is desirable to write upon all the letters after the first, a clear indication of that order. A memorandum consisting of the words "second letter," "third letter," and so on, will serve the purpose where the plan of marking the hour of arrival is not in vogue. Such a method will reduce to a minimum the danger of misfiling; and even if the letters should accidentally be placed on the file out of their order, the fact that they are out of order will be self-evident whenever the file is consulted, and the necessary re-arrangement can



then be made. And where the plan of numbering consecutively all the papers on a single file is adopted, the memorandum, "second letter" or "third letter," as the case may be, will serve as guidance to the filing clerk in the process of numbering them before filing.

### **A Correspondence Register.**

A practice that is not quite as widespread as it might be is that of keeping a complete record of every day's incoming letters. It can be dispensed with; but, on the other hand, it is capable of subserving certain very useful and desirable purposes. Its possibilities are worth a little consideration.

To be of real value a correspondence register should be something more than a mere list, however complete, of incoming letters. It should serve as a reminder of those letters which it was impossible to deal with immediately on their arrival and which have yet to be attended to. And it may serve the purpose of enabling the principal, where the correspondence is too large to be dealt with by one man, or the heads of departments where portions of the correspondence have to be entrusted to subordinates, to exercise constant and personal supervision over every detail of the day's mail.

To achieve these objects every correspondence register should be framed so as to show not merely what letters have reached the office on a specified day, but how they were dealt with, and when, and by whom.

### **For a Small Business.**

Where such a register is kept in a "single-handed" concern, it can, of course, be simple in form. In the left-hand top corner will be written in a good round-hand, or typed conspicuously in spaced capitals, the date. Then in one column will be written in succession the names of the persons, firms, or companies from whom the letters coming to hand on that day have been received. In a second column will be written a memorandum or a mark indicating which of them have been disposed of. This may take the form of a tick, thus "✓,"

which will serve equally for letters not requiring a reply and for letters to which replies have been sent. Every blank space in this second column will be a reminder that the letter against which a tick has not yet been placed remains unanswered. With such a register at his side throughout the day the business man whose business is not too large for him to manage the whole of it in person, ought not to forget any single item of his correspondence. At intervals during the day he will refer to the list, and as letter after letter is dealt with, the ticks will increase and the blank spaces will diminish. At the close of the day there may be—and on occasions of pressure there will be—letters with which it has been impossible to deal. A good plan is to make a large cross **X** in red ink or blue pencil in the appropriate spaces, to serve as a reminder on the morrow that the letters so marked have to be dealt with. When a letter marked in this manner in the register has been actually disposed of, the cross can be cancelled by a tick in black. No single day's list should be put away until it shows that every letter whose arrival is recorded on it has been appropriately dealt with. There may be several such lists—lists extending back for a week or longer—on the desk at one time. They should be fastened together with a paper fastener of a kind that will permit of the easy and rapid withdrawal of any one of the lists as soon as the whole of the letters entered upon it have been disposed of. Each day's register when it has reached this stage can be filed away in order of date and kept in a drawer or other suitable receptacle. It is a record that stands by itself and does not call for any card entries or for cross-references of any kind.

Such a register, kept in this way, should be a perpetual and a potent stimulus to a man of business to deal as promptly as possible with his incoming correspondence; it should effectually prevent him from overlooking any single letter. The time occupied in keeping it is infinitesimal. Where a comparatively large batch of letters arrives, as it normally does in the morning, a clerk may enter up the names. Many of these it will be possible to enter in an abbreviated form—

in some cases they may be reduced to mere initials. Where letters come in during the day in twos and threes, the principal will himself enter them in his list as soon as he has opened and read the letters.

### **For a Large Business.**

For a register of incoming letters kept in connection with a large business something rather more elaborate and detailed is desirable. In framing it, its two-fold purpose as a reminder and as a means of enabling effective supervision to be exercised should be borne in mind. Where there are two partners and the business is of such a character that between them they can deal with the whole of the correspondence, two lists prepared according to the method already suggested will suffice—each list containing a record only of the letters assigned to one of the partners. Where, however, the business is worked departmentally a separate register should be kept for each department, it being the duty of one specific person in each department to enter the necessary particulars of all letters reaching that department. The register should take a fuller form than that applicable to the “single-handed” business. In addition to the list of names, there should be a column headed “When answered,” another headed “By whom,” and another headed “Filed by.” Various symbols can be improvised to simplify the process of keeping this register and to lighten the work involved in keeping it. For instance, a “dash”—a short horizontal line—written in the column headed “When answered” against any particular letter, may serve to indicate that the letter does not need a reply. A tick standing alone may indicate that it has received a reply on the day of its receipt, the actual date being written only when the reply is made on a subsequent day, and then made “short,” thus 21-7-24. The filing clerk will simply write his initials against the names of the letters which he has filed. Usually he will write his initials once against a long batch of letters entered successively. Keeping such a register involves slight demands on the time of the clerical

staff. The aggregate time required daily for the purpose, even in a large business in which letters arrive by hundreds, will be comparatively insignificant.

### **The Register as an Aid to Supervision.**

The supreme value of the register is seen when its vast possibilities as an aid to effective supervision are realized. The principal can call on any one of his subordinates, or on the head of any one of the departments into which the business is sub-divided, to produce his correspondence register, or every one of the correspondence registers kept by him which has not yet been filed away. In a few minutes he can go through these with the appropriate member of the staff, ascertain what letters are standing over, inquire why they are still standing over, and insist on immediate attention being given to those that ought to be disposed of without delay. Thus he can keep an active and perpetual control over the entire correspondence of a large business ; and the knowledge that at some time every day he will require to see all outstanding correspondence registers will compel the members of his staff to attend to their work promptly and to avoid the dangerous and, generally speaking, quite useless habit, of " putting things off."

What the principal can do, every partner and every manager of a large department can do also. No item of correspondence need be neglected, even in a large business. The one way of preventing neglect is to make the supervision regular.

So much for the correspondence register. But modern inventiveness has furnished the business man with other devices in the way of reminders. And there are other requirements that have to be attended to beside correspondence, and that call for some provision to prevent their being even temporarily overlooked.

### **Desk Trays.**

A simple arrangement capable of satisfying a methodical man whose business is small is the provision of three trays

kept always on the desk. Into one of them are placed all letters requiring replies and not yet dealt with. The second is reserved for letters to which replies have been dictated but the replies to which have not yet been signed. It may be necessary to refer to a letter to verify a date, a quotation, or some other statement when reading over the typed reply with a view to signing it. In the third tray will be placed (a) all incoming letters not requiring reply; (b) all letters to which replies have been signed and put forward for dispatch; (c) copies of all letters which have been signed for dispatch. The presence of a letter or of a copy in the third tray is an indication that it is to be filed as soon as possible. The presence of a letter in the second tray acts as a check upon the letter-writer or typist. You require to be certain that every letter dictated has been transcribed and dispatched. Sometimes owing to exceptional pressure it is impossible for a part of the correspondence dictated to-day to be dealt with by the typist till to-morrow. The presence in that tray to-morrow morning of certain of to-day's letters will show that the answers have yet to be brought along for signature. Here again the indispensable task of supervision will be simplified and aided.

For a larger business a slight modification of the plan will be desirable. When a letter has been answered it by no means follows that it is wise to place it and the copy of the reply sent to it on their permanent place in the file immediately. It may be necessary to pass it on to a special department for attention there to the subject matter of the letter. There may be goods to be dispatched, an account to make out, directions to be given as to work to be done arising out of the letter, or any of a thousand and one other things to be done. It may be necessary that the head of the department should make entries in a diary, or on a loose sheet, of the steps that are to be taken consequent upon the letter, and of the dates upon which they are to be taken. Obviously, if trays are employed, except in very small businesses, one of them should be kept exclusively for papers that are ready for filing at once.

Into that tray nothing should be placed that has to be passed on to another department for attention. The presence of any document in it should be a clear indication to the filing clerk that it is to be filed forthwith.

### **Business in Suspense.**

For some purposes it becomes necessary to keep together temporarily papers which will ultimately be distributed or dealt with otherwise. For instance, a man advertises for tenders. As these come in one after another, he needs to file them so that when the time for receiving tenders has expired, he will have them all before him for consideration. The convenient course is to place them in a temporary folder labelled "tenders," numbering them consecutively in the order of their arrival and adding the date of receipt.



STOLZENBERG PATENT FILE CO.

The same folder may be used subsequently for any other purpose, a new label being attached.

## CHAPTER X

### REMINDERS

To ensure that the day's work shall be attended to on the day, "reminders" of some sort are essential. This was discovered long ago. The old-fashioned "diary," which, though perhaps in newer shapes, can never be dispensed with, came into existence to supply the need. A record of the day's engagements must in some form or other be kept. Nowadays, while the book in which engagements are entered remains, we have "loose-leaf" diaries which can be always kept with to-day's list face upwards, making immediate reference possible at any moment. Another device consists of a set of washable tablets, one for each day for a whole month. On these all engagements are written as they are arranged. Each tablet bears a number corresponding to the day of the month to which it relates. Loose-leaf sheets are made bearing similar indications. These can be obtained for an entire year, the name of the month as well as the day of the month being printed on them. The tablet for each day lies open before you on your desk. The remainder are kept in a drawer. The card system has also been adapted for the same purpose. A set of cards sufficient to last twelve months can be kept in a small drawer labelled "engagements," every appointment or other necessary record being written on the proper card at the time it is arranged. Each card is, of course, dated, and the series serves all the purposes of a desk diary.

No filing system, however ingenious, can enable "reminders" of this character to be dispensed with. There must be a list of the day's engagements. But there are limits to the applicability of a desk diary, a loose-leaf diary, a tablet, or a card diary. The chief value of these things is to enable appointments to be kept with certainty. Their

utility is weakened if they are crowded with entries. In any large business there will be items which cannot conveniently be entered, and which nevertheless call for reminders of some kind. The solicitor who has to take the various steps in an action within prescribed periods of time, can enter up in his "diary"—whether it take the form of a book, or a set of tablets, loose-leaves, or cards—the date on which his time will expire for taking any particular step. The contractor who has to lodge estimates or a tender before a fixed date can employ the diary for a similar purpose. But even the solicitor will not always find the desk diary sufficient. If a part of his duties be the collection of debts, and he is receiving payment in a few instances by instalments, entry in his diary of the day on which each successive instalment is payable will serve as an effective reminder. But if the debts which he is receiving in that way are numerous, it will prove awkward and inconvenient to crowd the pages of the diary with separate entries relating to each one of them. The value of the desk diary, whatever form it may take, depends upon its entries concerning each separate day's work being so written and arranged that all the items requiring attention on that day shall readily catch the eye, which they will not do if they are unduly numerous. The man who carries on one of those businesses in which, as regards nearly every transaction, an estimate precedes an order, will need to keep a record of every estimate sent in, and will need also to ascertain whether the estimate has been accepted or not by a given date, and to be in a position to make any necessary inquiry on the point after the lapse of a suitable interval. A man who has received an inquiry from a possible customer will desire to be able to communicate further with the inquirer if an order has not resulted, and he will need to be reminded of the circumstance on a fixed date.

All these requirements are quite distinct from those of the man who has to make applications or remittances of a special character periodically. The insurance company which collects all its premiums annually at the commencement of a quarter

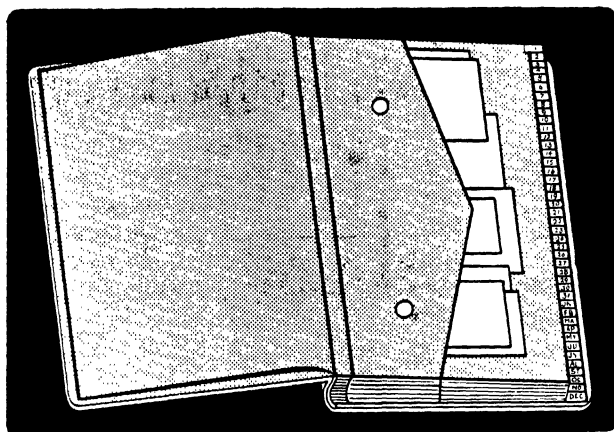


—some of them at the beginning of each of the four quarters—can readily prevent any failure in applying for payment at the right time by entries on cards arranged alphabetically and filed, each set being deposited and kept in a separate drawer labelled with the quarter in which all the premiums with which that set of cards is concerned are payable. The house-agent collecting quarterly rents and paying ground rents, rates and taxes periodically, can manage very effectively with a similar simple equipment. The magazine publisher receiving subscriptions payable at regular intervals can keep his lists on cards, arranged so that they themselves constitute a reminder. But the manufacturer who has sent in an estimate, or who has sent out a price list to an inquirer will need, not a quarterly reminder, but a daily reminder. His “follow up” method may be to write a week after he has replied in the first instance to his inquirer or sent in his estimate to a prospective customer. It may not be convenient to burden his desk-diary with entries of this kind: if they are numerous it will certainly not be desirable to do so. In that case he must make, somewhere and somehow, a written record; and he must file it so that it will be available on the required day. Inventors of modern filing systems have not overlooked this necessity. One of their provisions takes the form of a Reminder Book.

### **Reminder Book.**

One “Reminder book” now on the market consists of a stout cover enclosing a set of manila pockets, forty-three in number, each being provided with an index tab. The first thirty-one of these pockets are each opposite a date, the numbers running from “1” to “31,” so that there is one pocket available for every day in the longest months. The remaining twelve pockets are opposite the names of the months in their order from January to December. The numbers 1 to 31 and the names of the months follow each other down the right-hand side of the book and thus form an index. Slips, uniform in size, are supplied on which all necessary particulars can be

written or typed. If on the 10th of the current month you take some step, apply for a quotation, submit an estimate, write requesting one to be submitted to you, apply for an overdue payment, dispatch a price list to a possible customer, or forward an order, you may think it desirable that you should know on the 17th what has been the result of the step you have taken. You enter on your slip whatever particulars may be necessary, and place the slip in the pocket opposite number 17 in your marginal index. On the 17th you open



REMINDER BOOK (STOLZENBERG PATENT FILE CO.)

it, remove the slip and any others that may be in the same pocket, and attend to all the matters of business to which the several entries relate. As soon as you have removed the contents of to-day's pocket it becomes available for slips dealing with items to be attended to on the 17th of the following month. Any slip which relates to a date more than a month ahead is placed in the supplementary pocket beside the name of the month in which it is to be attended to. The contents of every monthly pocket are removed on the first day of the month, and are placed in the daily pockets for what has then become the current month.

If on attending to-day to the matter mentioned on any particular slip I find that it will be desirable to give it further attention on a future day, I simply insert the slip, after making any necessary record upon it, in the pocket opposite that future date.

All that is required to enable such a scheme to work efficiently is the habit of referring to the Reminder Book regularly every morning, say, immediately after the morning's mail has received attention.

### **Card Reminders.**

Instead of a book a set of cards with "guides" numbered and marked in the same manner in which the "Reminder Book" is indexed will, of course, serve the purpose equally well. Advocates of the card system proclaim that it serves the purpose better because the card takes the place of the slip, needs no pocket to contain it, and is therefore more easily referred to. The cards, of course, necessitate a drawer of the usual type to hold them.

A more elaborate "Card-Reminder" scheme is sometimes preferred, a complete alphabetic arrangement being provided for each day. In some exceptional instances, where the daily reminders are necessarily very numerous, this plan may be serviceable. But for all ordinary purposes it is needlessly elaborate; it may be bulky, with a multitude of unused spaces; and it is expensive.

### **Loose-Leaf Reminders.**

The practice of keeping records of all transactions on loose-leaves, arranged numerically or alphabetically, and held together by a substantial binder—a practice which appears to be spreading—has led to another "reminder" scheme, one intended to dispense entirely with any separate set of cards or other records for the purpose. Down the right-hand margin of each "loose-sheet" is printed a series of numbers from 1 to 31, these being intended to indicate the days of the month. Movable metal clips or "markers" are supplied for

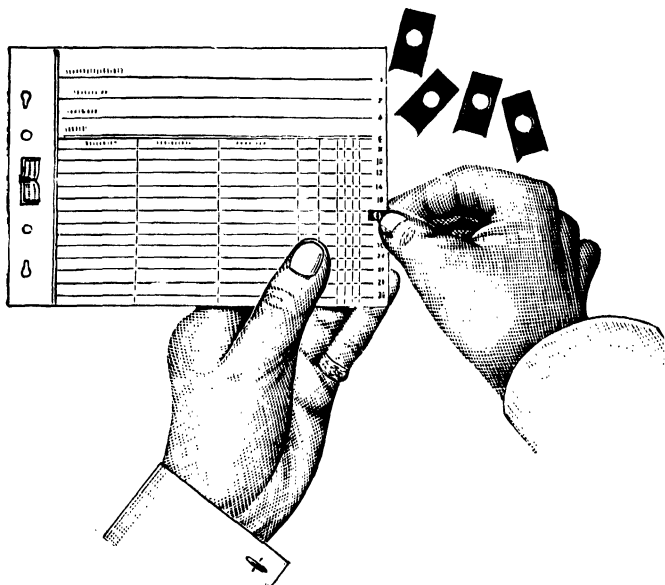
use in connection with the sheets. When it is desired to notify that a particular matter is to be attended to on a specific future day, one of the markers is slipped over the edge of the leaf containing the records relating to that matter, the marker being placed on the marginal day-date. On opening each of the record books it can be ascertained at a glance what items are to be attended to on any particular day. The records in the "binder" constitute the book, and there is no need to make any entries on separate cards or slips to serve the purpose of the required reminder.

This method involves the necessity of going through the entire record-files every day; and if these are numerous or are contained in many "binders," the labour of consulting them, and in some instances of removing them from and returning them to their appropriate drawers in the filing department, will mean an addition to the ordinary work of the office. The time is saved that would otherwise be expended in making the special record, which after all need only be made once, for one slip, card, or sheet, will serve the purposes of a "reminder" on many occasions; but against this saving there is loss of time in going through a series of books with the aid of the marker-indications as compared with consulting a file in which every record that has to be attended to on a particular day is available at once, because all the records needing attention on that day are filed together.

### **Classified Reminders.**

In this matter of "reminders," ingenuity has ranged over a wide surface. Classification by date involves coming to a prompt decision as to the precise day on which every letter, estimate, tender, inquiry, account, or other item for which a reminder is to be supplied shall automatically bring itself forward for attention. It is not always indispensable that a specific matter of business shall be attended to on any specific date, though it may be necessary that it shall be dealt with before a specific date or within a specific period. There is a "weekly reminder tray" on the market which provides for

the items to be attended to during an entire week. It has an alphabetical arrangement, so that all the letters, catalogues, price lists, etc., that are to be considered, are temporarily filed under the appropriate alphabetic sub-divisions. Every Monday you deal with one section of the alphabet, say A to D ; on Tuesday you take a further section, say E to H ; and



REMINDER MARKERS (*Moore's Modern Methods*)

so on, in such a manner that by closing time on Saturday you have disposed of the last item classified under Z. There is one purpose for which, in certain businesses, this method may be recommended. Where a "follow-up" system is employed in a business, as, for instance, one in which very many customers are obtained through extensive advertising, the alphabetic weekly reminder may very well serve all the purposes of the department or the individual member of the

staff responsible for following up inquiries until orders arrive or for other reasons it seems unnecessary to continue the efforts to secure them. In the case supposed the applications will be numerous, and it may be more convenient to spread over a whole week the business of attending to a large batch of them than to allocate a specific date to each. And there may be other instances of temporary filing in which the weekly classification may be all that is needed. But it may be doubted whether the weekly plan is so desirable for general purposes. On the whole, it is better to assign an exact date for a matter to come up again for attention. When that day arrives some reason may exist for postponing the business. It is easy to transfer it forward to another definite day. To assign an indefinite date is a less useful device for keeping clerks up to the mark—and employers, too, for that matter—than the practice of deciding promptly on what particular day an item of business shall be brought forward, and utilizing your “reminder” scheme so as to ensure that it shall come forward on that day.

Another method of classification for which reminder trays are provided dispenses with arrangement either by date or by letters of the alphabet. The papers kept for dealing with subsequently are temporarily filed in the tray under “guides” labelled in various appropriate ways to suit the requirements of any particular business or the preference of any individual business man. These labels may be as follows: “urgent matters,” “require early attention,” “accounts to be checked,” “accounts to be paid,” “to be looked through,” “to be filed,” “estimates to be sent in,” and so on. An indefinite variety of such headings can, of course, be invented to suit all purposes. “Letters to be answered,” “letters to be written,” “books to be consulted,” “press cuttings,” “articles to be written,” “suggestions for stories” (or for essays), might, for instance, form the headings of the reminder tray on the desk of a busy literary man. “Meetings to be arranged,” “applications for subscriptions,” “applications for gallery seats,” “constituents’ inquiries,” “local

invitations"; these might form some of the headings visible in the reminder tray on the desk of the busy member of Parliament.

### **Other "Reminders."**

There are other "reminder" schemes, but they hardly call for description. Attempts have been made to minimize the labour of providing "reminders" by using the folders in which the correspondence is placed for that purpose. A separate drawer is provided in which the folders containing papers that require attention on future dates, are arranged under those dates and in alphabetical order. The drawer is labelled appropriately "matters in suspense," or "for attention," or in some similar manner. And these contents are, of course, looked at daily. This method is self-indexing and it avoids the necessity of all supplementary or special records. But its efficient working means that folders will be removed again and again from their place on the general file and deposited in the special "reminder" drawer. When any one of these folders is required a double search will be necessary, first in the ordinary file, and secondly in the "reminder" file. And it will be found desirable for the sake of certainty, on every removal of a folder from its normal place in the general file to the "reminder" drawer, to insert an intimation of the fact, as notice to the filing clerk or other person who may happen to be searching for the folder. And this means extra trouble.

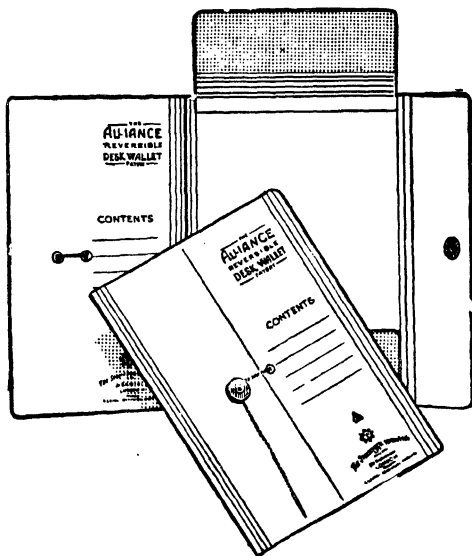
### **A Final Word as to "Reminders."**

The effectiveness of any reminder scheme depends upon the strict and unvarying observance of two rules. These may be concisely stated thus—

(1) As soon as you have taken any one step in relation to a transaction make your note for the next step that it will be necessary or desirable to take. Make it in the proper place if it is written in a book, or insert it in its proper place if it is written on a "reminder" slip, so that in either case

it shall come up automatically for attention at the right time. Make your note and put it in its appropriate place before you attend to your next matter of business.

(2) Refer every day to all the reminders for that day. Allot a special hour daily to the performance of that task, and, except when unavoidably prevented from doing so, which will not often happen, attend to the "reminder" business regularly at that hour.



ALLIANCE REVERSIBLE DESK WALLET.  
(Stolzenberg Co.)



## CHAPTER XI

### SUBJECT-RECORDS AND A SUBJECT-INDEX

EVERY business man is concerned in collecting and preserving for reference all information that he can get from any source that can be relied upon with reference to the manufacture, the process of manufacture, and the sale of all the articles in which he deals, the materials of which those articles are made, the actual and potential markets for them, the conditions under which they can be sold in various countries, new methods of treating the material, the means of transport, tariff charges affecting the goods, British and foreign patents having a direct or indirect bearing upon the manufacture or the process or cost of manufacture, new inventions that may necessitate alterations in his business or affect the prospects of the business, and other items of information that may be immediately or may become in future, of importance to him as a help to the successful conduct or expansion of his business. Information on these and on all other relevant points may reach him in various ways. A correspondent in Sierra Leone, in Shanghai, or in San Francisco, may in the course of a business letter that will as a matter of routine find its way into a folder filed under a number or a name, mention some fact that the recipient of the letter will promptly recognise as worth knowing and possibly acting upon. The writer may quite incidentally make a number of statements which throw a flood of light upon the peculiar features of the market with which he is intimately acquainted. He may say something illuminating as to the quality, size, shape, colour, decoration or accessories which will render a particular article easy of sale in the local market. He may intimate the price or prices which local purchasers are prepared to pay, or the discounts which rival manufacturers are allowing locally; he may

describe the effect of the climate upon the goods or upon the cases or wrappings in which they are enclosed. And he may offer valuable suggestions based upon his local knowledge and experience. Or a correspondent in Germany may give particulars of a new invention enabling certain articles to be produced more cheaply, or he may mention some social or commercial fact that is likely to cause an increased demand for certain classes of British goods. Another correspondent elsewhere—perhaps in South America—may refer to the opening of a new railway or a new canal making accessible towns and districts and settlements which were not accessible before; or he may call attention to new sources whence raw material may be advantageously obtained.

The information contained in any such letter may not need to be acted upon immediately. It may be impracticable for various reasons to act upon it at the time. Yet if the letter be simply filed in the ordinary way with the everyday correspondence of the firm, it will not be easy to put one's hand upon it when the time comes to utilize it. To render it accessible at a moment's notice at any future date when it may be desirable to refer to it, it must receive special treatment. Two courses are available. Either a copy must be made of the information which is recognized as likely to be of use hereafter, and this, supplied with an appropriate heading, must be filed under the heading in a "subject-record" drawer, or a reference must be made to it on a separate card having a similar heading, and the card must be filed in its proper place as part of a subject-index. Where a mere index is preferred, the entry on each card may be very concise. "Shanghai: Requirements of local market. See letter from J. F. Kemp, 25.8.24"; "Buenos Ayres: New markets in. See letter from J. Pichon, 9.9.24"; "Patents: New German. See letter from Wurtz & Schmidt, 15.9.24": these are specimens of all that is absolutely necessary for the purposes of a mere index where a purely alphabetical filing scheme is followed. Where the scheme adopted is numerical it is desirable to add the correspondent's "call number," so that the

folder containing the letter which it is desired to consult may be found without the delay of searching the alphabetical index to ascertain its number. It will be obvious that the preparation of such a subject-card as is here suggested will involve very trifling demands on one's time.

The card entry must be made at once or, at all events, before the letter containing the information is filed. It may not be convenient to make out the card immediately after reading the letter: there may be scores of other letters waiting to be read and considered. In that case some clear intimation should be made on the letter itself as a notification or reminder that a subject-card is to be made out before the letter is filed. A line in the margin, in blue or red pencil, opposite the passage which is to be the subject of the card-record, with a memorandum stating the heading to be written or typed on the card, will be sufficient for the purpose. Where it is left to a filing clerk to make out the subject-cards, he should be required to make against the marked passage some agreed written sign—a cross or a tick—to indicate that he has complied with directions conveyed in the manner already suggested. There are circumstances in which it will be desirable to require ocular demonstration of the fact that he has done so by insisting upon production of the new subject-card before the letter is filed.

But the information which the business man desires to preserve for possible future use may reach him through some other channel than a letter. It may come to his notice in a trade circular, a catalogue, a newspaper paragraph, a magazine article, or an advertisement. It may be a suggestive piece of printed criticism which may have set him thinking as to the possibilities of effecting certain economies in working, of adopting some new machinery of distribution, or checking costs, reducing waste in production. If the information be contained in one of a series of trade circulars which it is his custom to preserve and to file, or in an article in a magazine which he habitually binds and keeps for reference, a note on a subject-card with an appropriate heading, mentioning, in

the one case, the name of the person issuing the trade circular, its date, and the fact that it is a trade circular, and adding in the event of a numerical filing scheme being in use, the number under which the circular is filed, or mentioning in the other case the date, volume, and page of the magazine containing the article, will render the information available at any moment.

Where the information takes a form which cannot conveniently or adequately be dealt with in this way, where, for instance, it is found in written or printed matter of a kind which it would not, in the ordinary course of business, be usual to file—as, for instance, in a memorandum made of some statement heard at a meeting of a Chamber of Commerce in the course of a discussion on some trade question, or in an article in a newspaper which will be destroyed next day—something more than a mere index is necessary. The memorandum itself must be furnished with a fitting heading and filed, or the newspaper article or paragraph must be cut out and pasted on paper, headed appropriately.

And here arises a little problem of filing. Normally the subject-records will not be numerous. In some businesses there will be many of them, enough to justify the allocation to them of a series of folders and a separate drawer. In other instances they will be so few as to make provision of that kind absurd. But in any case it is desirable that they should be kept apart from the ordinary correspondence files, and that they should be as easily accessible as the correspondence files. For that purpose they should be arranged in alphabetical order. They may be kept in folders with the necessary guides. Where they are sufficiently numerous, a separate drawer may be assigned to them, and it may be labelled "For Reference." As, however, there will probably not be more than one or two records under any one heading, it would be wasteful to allot a separate folder to each. One folder may contain all the records classified under the letters A to C; another those classified under D to F, and so on throughout the alphabet. Or, where necessary, there may be one folder for each letter of the alphabet. Each folder

may conveniently contain a separate list of all the headings of the subject-records within its covers to serve the two purposes of an index and of an intimation that a record which is not there has been withdrawn for some purpose. An alphabetical arrangement is preferable to a numerical arrangement where subject-records are concerned, because all records having the same heading will be filed together, whereas under a numerical arrangement they will be scattered, the numbers assigned to them depending on the order in which they are filed. Nevertheless a numerical system can be applied to them with the assistance of that indispensable accompaniment of the numerical system, an alphabetical subject-index.

It is possible to develop a mania for keeping subject-records and subject-cards. Like all other admirable practices, it may be overdone. A useless multiplication of subject-records or of subject-cards is a hindrance. But it may be safely affirmed that most business men err in the opposite direction, and keep too few subject-records, often reducing very greatly the value of those which they do keep by the absence of any effective system of classification. And even where the records are needlessly numerous, it is to be remembered that a collection of subject-records is always flexible. Some of them will serve only a temporary purpose. The business man who has an adequate sense of the value of space in his office will destroy them as soon as that purpose has been served. They get out of date and may then be promptly consigned to the waste-paper basket. Wherever this is done care should be taken to strike out the heading of the destroyed record from any list contained in a folder, and to withdraw any card containing that heading from the set of cards comprising the card-index.

Of the general utility and varied applicability of the practice of keeping subject-records, accompanied or not accompanied by a subject index, there can be no doubt. Of its general applicability one further illustration must suffice from among the many that could be given.

A man carrying on business in Manchester contemplates

opening a branch or starting an agency in Huddersfield or in Edinburgh for the sale of the goods in which he deals. He makes inquiries of correspondents, receives replies, pays a personal visit to the town, finds out all that he can as to the prospects of his projected venture proving successful, how many people are engaged in the town in the same business, whether they are wideawake people likely to be dangerous competitors, what part of the town is most suitable for him to establish his branch in, in what thoroughfare it will be most desirable to have his show-rooms, what is the scale of rents in that thoroughfare, where there are any suitable premises to let, and so on. In short, as a prudent man, he accumulates a mass of information before he decides finally to carry his project into effect, or perhaps to abandon it as too risky. The whole of this information as it comes to hand, whether it takes the form of replies from local people to whom he has written on the subject or of written notes of the outcome of verbal inquiries made by him in person, may fitly be arranged and stored among his subject-records. And it may be worth while to preserve it for a few years. A course which may seem undesirable to-day may offer very much greater chances of success two years hence, and in that case the information now collected may prove valuable. It may save a good deal of time and labour then if it can be referred to at once. He will turn to his subject-records under the heading "Edinburgh" or "Huddersfield," as the case may be, and will find himself instantly in close contact with an important body of facts.

### **Subject-Records for Professional Men.**

If for the mercantile man a systematic method of arranging and preserving subject-records is necessary, it is still more necessary for the professional man. The fact is that he will suffer far more from neglect to keep such records than will the ordinary man engaged in commerce. For the professional man has always to be in touch with the latest additions to professional knowledge.

### **The Medical Man.**

If he be a medical man, whether he be a great specialist, a consulting physician, a surgeon, or a general practitioner, his task is to apply for the benefit of his patients the best treatment available at the time. His business is not one learnt once for all in the medical school or the hospital. Research and experiment are every day bringing to light new facts in relation to diseases, their origin, their growth, their symptoms, and their treatment. New remedies, new palliatives, new appliances for relieving pain or for hastening a cure are constantly being discovered. The medical man is always a learner. His own observations of the peculiarities of individual patients, his own experiments, the experience that he gathers in the exercise of his profession, his successes and his failures, all contribute to his store of knowledge. His own observations of the detailed course of a disease or of the effect of certain drugs or of certain surgical treatment on the organs or on the general condition of a patient may be of invaluable assistance to him on some future occasion, if only his observations upon the case are so recorded, classified and preserved that it will be possible to refer to them immediately it becomes desirable to do so.

He has therefore considerable need for a series of subject-records. His own observations, written out at sufficient length for his purposes—which means with no more fullness than is required to make his points clear—headed and filed away alphabetically, will be available whenever they are wanted. With them he should file newspaper cuttings consisting of special articles, notes, paragraphs and information bearing upon the particular complaint which his own personal notes concern and its treatment, and also notes made by him during his reading, and references to any allusions in text-books, to the same complaint or its treatment. Thus, in course of time, he will accumulate a mass of useful information and hints on the subject, and he will have it all assembled in such a way as to be accessible at a moment's notice. Care will be needed to avoid duplicate headings, so that the records

relating to one topic shall not be distributed. This matter of headings is all important where subject-records and a subject-index are concerned. The multiplication of headings leads to confusion ; and it may be recommended that sheets of paper of one size shall be used as far as possible for all papers that are to be filed together—for notes of personal observations, notes made while reading, extracts from books, newspaper cuttings, etc. An alphabetical arrangement, rendering the records self-indexing, will generally serve.

### **Subject-Records for Lawyers.**

Solicitors are in the habit of preserving vast quantities of papers—drafts and fair-copies of documents of all kinds as well as correspondence. These are usually grouped in the way most useful for everyday purposes, all the papers of every description relating to any one transaction being kept together and labelled with the client's name and such additional indication as will enable the precise " matter " to which each specific bundle of papers relates to be readily identified. " Mr. and Mrs. J. P. Brown : Marriage Settlements " ; " T. W. Smith : Purchase of Wolmer Lodge " ; " A. N. Wilson : Sale of 250 Cheapside " ; " Mrs. Bettany : Will " ; " T. W. Tompkins : *ats.* Watson." These are a few specimens of the kind of label affixed or endorsement on the outside cover or topmost paper in the bundle. When each matter is completed the papers are put away, their whereabouts being recorded in an index, or the arrangement being such that an index is deemed to be unnecessary. Assuming that the arrangement is orderly and that the index, if any, is properly kept, this simple filing system is effective enough to enable any desired papers to be found whenever they are wanted. One advantage of an index is that when papers are, as sometimes happens, delivered to a client or to another practitioner, on the client changing his solicitor, or when they are destroyed, the fact may be entered in the index so as to account for the absence of them. And there are other circumstances which would render an index useful. Mr. T. W. Smith, to whom we



have already been introduced as the purchaser of Wolmer Lodge, may at a subsequent date execute a mortgage on that house, and there may be good reasons why the two sets of papers concerning the purchase and the mortgage should be kept apart. Later on he and his mortgagee may lease the property; it may become the subject of a marriage settlement; and it may some day be sold. Either the whole of the papers concerning these varied transactions will be kept together or those relating to each separate transaction will be kept apart from all the others. And whichever course be adopted an entry, or rather a succession of entries, in an index will show that the various transactions have taken place and that they all affect the same property. An alphabetical card-index will very conveniently serve the purpose. The first card showing the whereabouts of the papers that accumulated on the occasion of Mr. Smith's purchase of Wolmer Lodge may have a brief reference written upon it to each one of the subsequent transactions in which that property was involved. It will be a record of them all and will show whether the whole of the papers have been filed away together or separately, and where. When any one set is looked up in future there will be no danger of overlooking the others or of forgetting their existence.

This plan of arranging and indexing papers may fairly be referred to as an illustration of a special method of keeping subject-records and a subject-index, inasmuch as the classification, whether an index be employed or not, involves an indication of the nature of the transaction to which the papers relate in addition to the client's name. But there is a more special sense in which the need for subject-records and a subject-index undoubtedly exists among solicitors.

In the first place, there is at least as much need on the part of a solicitor to keep notes of his reading as there is on the part of the medical practitioner. If he has not to experience the shock of new discoveries altering suddenly the practice of a lifetime, he has to adapt himself perpetually to an ever-changing body of law, to new interpretations of old laws

expounded unexpectedly from the judicial bench, and to new forms of documents and new practices consequent upon those changes. Volumes of " digests " periodically tabulate these changes in detail ; but considerable intervals often elapse between the appearance of successive volumes of " digests." Some of the legal newspapers provide brief notes of new decisions arranged for cutting out and pasting into recognized text-books, and furnished for that purpose with references to the edition and the page to which they should be affixed. The individual practitioner may, however, not possess the particular text-books referred to. And yet the notes may be invaluable to him. Why should he not classify and preserve them ? He may want them at any moment. Pasted on sheets of paper with appropriate headings and filed away alphabetically they will always be accessible. In some instances he will be able to add notes of his own under the same heading. In his case, too, there are newspaper articles which are of great value. The pages of the various legal " weeklies " often contain in the form of an article a summary of all the decisions on some one point, a summary that serves as a kind of index to all the case-law on the subject and that brings together compactly a mass of information that could not otherwise be got at without a large amount of searching through many volumes of different sets of " Reports." It is worth while to cut these articles out from amid the collection of ephemeral matter in which they are found, and to preserve them.

Furthermore, a solicitor sometimes finds it useful in relation to current business to be able to refer to old papers filed away in which some special question was involved or some unusual procedure had to be followed.

A simple and effective plan is to keep a card-index of subjects. The entries on each card may be very brief and need therefore occupy very little time in the making. " Company : Reduction of Capital," as a heading, with a note underneath, " Horley Gold Mines, Ltd.," with a reference to the number of the papers, if it be the practice of the office to number

papers when they are put away, or any other necessary indication as to the whereabouts of the papers, will suffice to enable the procedure and forms relative to the business of reducing a company's capital to be ascertained when another company comes along and desires to go through the same process. "Ademption," for heading ; "T. Smith's Estate : Opinion of Mr. Sphinx, K.C." ; "Will : Proof in Solemn form : re Walter Brown, deceased" : short records of this character, arranged alphabetically, are all that are required.

Where such an index is kept it is desirable that it should be made complete by including references to other subject-records taking the form of newspaper cuttings, notes of decisions, notes of reading, etc. One small drawer will usually hold all the cards comprising the subject-index ; and another drawer, with a few folders, will hold all the subject-records of the latter description.

## CHAPTER XII

### WHERE MIXED METHODS ARE USEFUL

THERE are instances in which the adoption of one uniform filing method presents difficulties ; and in which the employment of mixed methods may be preferable. It may therefore be useful to illustrate the occasional advantage of a mixed method, by showing its applicability in one or two special but not unfamiliar cases.

A judicious mixture of horizontal and vertical filing is sometimes desirable. A few typical callings of which this is true may be mentioned. Let us take first the professional work and the special requirements of surveyors and architects.

#### **Surveyors and Architects.**

These professions are in some instances practised separately, and sometimes jointly. In either case they have certain features in common, which warrant the grouping of them together, so far as their filing needs are concerned. There are surveyors who are also auctioneers, and others who variously style themselves house-agents, land-agents, and valuers. For the sake of simplicity, and with a view to brevity, it is proposed to omit reference to these special features, except so far as they fall within the general and necessary scope of the ordinary duties of a surveyor as such.

A surveyor's duties are varied. He may be called upon to survey land with or without buildings on it, for the purpose of advising the sum which a willing purchaser should offer for it, the sum which a willing seller should ask for it, the sum which a lender can safely advance upon it on mortgage of it, or the sum an owner should require paid on the acquisition of the land by a public authority having compulsory powers of purchase. Or he may be requested to survey farm lands and buildings or house property in towns with a view to

serving upon a leaseholder a notice to repair or sending in a claim for dilapidations on the expiration of a leasehold term. Or it may be his task to advise as to the most profitable method of "laying out" a particular estate for building purposes. If it be decided to divide the estate into plots, and sell them separately by private contract, further duties will fall upon the surveyor. If it be decided to employ builders to build upon the estate under contract, or if, on the other hand, it be decided to let plots to builders or others willing to erect houses and to accept leases at ground rents, the surveyor may be entrusted with the supervision of the entire process, and his duties will not cease until the whole estate is fully "developed" by the construction of the necessary roads, the erection of the buildings determined upon, and the granting of the leases, if any are to be granted. This is by no means an exhaustive account of a surveyor's duties, but it is sufficiently complete to serve the purpose of indicating the special filing needs that grow out of the practice of the profession.

An architect will often undertake certain of the same duties. But the architect's distinctive work—that which differentiates him from the mere surveyor—lies in the designing of buildings of various kinds, the preparation of specifications, plans, drawings, sections and "elevations" relating to the necessary details involved in the erection and completion of the buildings, and the subsequent supervision of the entire work as it proceeds, and the granting of certificates from time to time of the completion of certain specified stages of the work entitling the builder to agreed payments or advances on account.

The performance of these tasks involves the accumulation of various papers and documents, which require to be filed for ready reference. These may be roughly classified as follows: (a) correspondence; (b) copies of reports and valuations, extracts from leases and other deeds, copies of contracts, specifications, conditions, certificates, and schedules of dilapidations, etc.; (c) plans and drawings, including those technically known as "sections" and "elevations"; and

(*d*) copies of the building regulations of various local authorities, and information on other official matters and matters affecting the building trade, the cost of building materials, etc. There will, of course, be other things accessory to the business; but the items specified comprise the important things that are certain, and that must be taken into account in determining the character of the filing system to be adopted.

For *a* and *b* a vertical system of filing will obviously serve. It is submitted that it will prove far more convenient in practice to keep *a* and *b* apart. It will often be necessary to refer to documents of the latter class on occasions when reference to the correspondence is quite unnecessary; and they will be more easily consulted if they have not been mingled with the letters than if they have been so mingled. Other advantages incidental to this course will become evident as we proceed.

The correspondence involved in these transactions should in most instances be filed under the names of the clients for whom the surveyor or architect is acting, keeping the entire correspondence relating to each separate matter of business, from whomsoever and from however many persons it may come, in one folder. It is always useful to be able to trace the whole history of a transaction so far as it is disclosed by the correspondence; and it is frequently necessary to do so. Only by adopting the method of keeping the whole of the letters concerning one particular property together, so that any one of them may be expeditiously found, whenever it becomes necessary to refer to them, will it be possible to trace the entire course of a complicated transaction without an elaborate system of cross-references and an undue multiplication of folders.

How the general scheme suggested may readily adapt itself to any useful sub-classification, can be usefully illustrated by reference to the work ordinarily connected with a building estate.

### **A Building Estate Scheme.**

Let us suppose, for instance, that a client, William Adams by name, is the owner of an estate at Barnes at present

"undeveloped" or unbuilt upon, and that he considers it to have become, to employ a conventional phrase, "ripe for building purposes." Let us suppose, further, that he consults his surveyor as to the manner in which it can be so made available as to be likely to "go off" successfully. For a time one folder will serve for all the correspondence relating to the estate. It will be deposited under "Ad," and it will be labelled "Adams, W.: Barnes Estate." In this folder will be placed in order of date correspondence with the client, with local authorities, possibly with neighbouring owners, with the client's solicitors, the solicitors and surveyors of neighbouring owners, and with persons who may apply with reference to the estate with a view to undertaking work upon it or purchasing or renting plots or taking plots on building leases. But a stage will arrive at which it will be found desirable to introduce a sub-division into the arrangement of the correspondence. A contractor—whom we may call Johnson—may be engaged to construct roads across the estate, and to lay sewers and drains in the roads. The correspondence that takes place in the course of the negotiations with him, and subsequently while the works he undertakes are being carried through, will most conveniently be dealt with by being kept apart from the general correspondence relating to the estate. It may therefore fittingly be provided with a separate folder. How this shall be labelled will be discussed later.

When the roads are made, and the sewers and drains have been laid, will come negotiations with builders and others willing to build. Smith may agree to take twenty plots, to build a house on each plot, and to take a separate lease of each plot when the house upon it is completed, at a specified ground rent. Brown may enter into a similar agreement with respect to a dozen other plots. And other builders may take further plots in the same way from time to time. And there may be sales of certain plots to persons who propose to make their own arrangements as to building.

In normal cases the correspondence relating to each of these

individual transactions will be large enough to warrant the provision of separate folders for them all. And here comes a choice of methods. We may either follow the initial plan and label all the successive folders "Adams, W.: Barnes Estate," adding on the file allocated to the correspondence with the contractor his name, "Johnson," and in the case of the various builders and purchasers their respective names; or we may introduce a subsidiary numerical scheme. Thus, we may number our original folder containing the general correspondence "1" this number being added to the general heading "Adams, W.: Barnes Estate." We may similarly number the fresh folders opened in connection with the arrangements with the various builders and purchasers subsequently, 2, 3, 4, and so on. It will be obvious that the first of these two courses has the advantage of being self-indexing, whereas the second of them requires the addition of a card index. The index may be very simple. One card, headed "Adams, W.: Barnes Estate," may contain a succession of sub-entries: thus "Johnson: roads, *etc.*, No. 1," "Smith: plots 5-24, No. 2," "Brown: plots 25 to 36, No. 3," and so on. But before discussing which of the two plans is preferable, it will be well to consider what other papers it will be necessary to file. We shall then be able to judge which method will best meet the filing requirements as a whole.

There will be a contract with the contractor in relation to the roads and sewers; there will be contracts with builders and purchasers; and there will be plans and other drawings in connection with all the transactions. Where the building arrangements provide for the builder to complete a certain stage of the building or a certain number of houses by a given date, there will be certificates to give from time to time of his having complied with his contract in this respect. The owner of the estate may have arranged to make advances to the builders as their respective buildings proceed, and the date and amount of each successive advance will be determined by the surveyor's certificate. It will be necessary to retain and file copies or duplicates of all certificates given, whatever



may have been the purpose for which they have been granted.

It is suggested that these copies or duplicates should be invariably annexed to and filed with the contract or copy contract which sets out the terms and conditions in pursuance of which the contractor or the builder is from time to time to become entitled to certificates. Further, it is suggested that a sort of index sheet should be made and also annexed to the contract setting out in tabular form the stage reached as each certificate is granted, the date of the certificate, the amount certified for, and any other information which the peculiarity of the transaction may render desirable. This will serve as a kind of conspectus, showing at a glance all that has taken place. A special folder will be desirable for each contract, and all things filed with it. These may include not merely duplicates or copies of certificates, but drafts or copies of special reports made from time to time to the client or to his solicitor. The "label" will be identical with that on the relevant correspondence folder. And all contracts and documents annexed to or filed with them, will be kept in a separate cabinet or drawer labelled "Contracts, etc."

We now have two sets of papers disposed of. Both may very well be filed "vertically," with the usual guides and alphabetical labels. Vertical filing, so far as these papers are concerned, economizes space and permits of easy and rapid reference.

But there is a third set of documents which also require filing—documents which it is necessary to find as quickly and with as much certainty as letters, contracts, and certificates. These consist of maps and plans, including in that term the drawings that are known technically as "elevations" and "sections." If Mr. Adams's building estate be a large one, there will in course of time, as its "development" progresses, be a large number of plans. Some of these will be on tough drawing paper; others will be on linen; and there may be printed copies, lithographed copies, and photographed copies. One's tendency is, as far as possible, to avoid folding

a plan, especially when it is drawn on stiff paper. In any case, plans, whether they are on thick or thin paper, or upon linen, do not, as a rule—except where they are small plans annexed to contracts or other papers—lend themselves readily to filing with other papers. And although some of them, owing to their size or shape, could without difficulty be filed “vertically,” there are always others as regards which that method of filing will prove inconvenient. It is better to have one general rule for plan-filing and to adhere to it throughout. The only method that will suit the generality of plans is horizontal filing—the plans being kept flat, and as far as possible, unfolded. A customary department in a surveyor’s office is the “plan room,” with drawing tables, ordnance sheets, and the various materials and appliances used in the preparation of maps and plans. It is suggested that the most suitable place for filing plans will be in this room. When they are large the tables there afford the indispensable conveniences for consulting the plans.

A separate label for every plan will be cumbrous and unnecessary. It is suggested that they should be filed in alphabetical order under the names of the various clients, those relating to one estate being all either fastened or filed together.

There will thus, in relation to the transactions concerning William Adams’s building estate, be several files (*a*) an indefinite number of correspondence files, the number being determined by the number of actual separate transactions that take place ; (*b*) a certain number of “contract” files, which number may be smaller than the number of correspondence files because there may be transactions the character of which may render separate correspondence files necessary, but may not involve any need for a contract or for any papers of the kind which it has been suggested should be placed on the “contract” files ; (*c*) a certain number of maps and plans to be filed. Vertical filing seems desirable for (*a*) and (*b*) ; horizontal filing for (*c*). If, on the one hand, it be desired to maintain in each set of files a complete and orderly numerical

arrangement, it may easily happen that there will be three separate numbers relating to a single transaction. The inconvenience of this is self-evident, even though it may be mitigated by a well-organized scheme of card-indexing. If, on the other hand, the alternative plan be followed of assigning the same number to every file (whether belonging to series *a*, series *b*, or series *c*) relating to a single transaction, there will only be one set (the *a* set) in which the numbers will follow one another consecutively. The intervals between the numbers in the other two sets will always suggest a doubt as to whether those files are complete; and it will be difficult without a careful and prolonged process of checking to be confident that any one set of files really is complete.

### **Surveyors' and Architects' Work Generally.**

When the foregoing suggestions have been considered, the question will arise, "How far do they provide, not merely for the filing requirements where the management of a building estate is concerned, but for the like requirements as regards the general miscellaneous work of a surveyor's office?"

Can we lay down a general rule for dealing with a valuation and report, irrespective of the purpose for which the latter may be required? There will be a little hesitancy here, because there are two ways of making and of sending in a report. It may take the form of a separate document accompanied by a covering letter. Or the report may be embodied in a letter.

How shall they be dealt with in filing them? It is suggested that all reports to clients or to their solicitors as to the value of property should be filed apart from the correspondence; further, that both correspondence and report should be filed under the same title, consisting of the client's name, and a brief mention of the property. A separate folder for each letter of the alphabet will be sufficient in most cases for filing reports. Where the business is small, fewer

folders still will be necessary. The divisions may be A to F ; G to J ; and so on. One general guide, "Reports and Valuations," will serve ; and these may occupy a portion of the same drawer or cabinet which contains the filed "contracts."

A similar method of dealing with specifications, schedules of dilapidations, conditions of sale, and other documents which it may be necessary to file, may safely be recommended. Instead of the label already suggested, "Contracts, etc.," a more comprehensive label may be employed, if preferred. "Contracts, specifications, etc.," should suffice.

The arrangement described is alphabetic. A very little ingenuity will enable the numerical method to be applied.

### **Generally.**

Ordnance maps kept for the purpose of general use in the office, will, of course, be filed apart from the maps and plans prepared in connection with the business of clients ; and the same remark applies to printed or other copies of the building regulations of various local authorities, official forms, catalogues, etc. These vary so much in character and quantity in individual offices, that any special hints as to dealing with them are hardly called for. For the most part they will be regarded as standing outside the general filing scheme. As a rule, the ordnance maps in any one office will not be numerous : if large, and mounted on stout cloth, they will probably be kept rolled, and be placed on a shelf or allowed to stand in a convenient corner of the room. The building regulations, official forms, catalogues, etc., may in some cases be kept in a drawer appropriately labelled. For regulations which it is necessary frequently to consult, a cover should be provided. The cover should not be of material that will easily tear or that will not stand rough usage. A stout manila cover is not expensive. It will be found to be tough enough to bear long use and to wear well. Every cover should be endorsed in bold letters, with a brief statement of the nature of its contents.

## **The Genealogist and Local Researcher.**

Another set of workers whose filing requirements are very special, consists of all those persons, of both sexes, who are engaged in collecting information in furtherance of what may be conveniently, though inadequately, described as "genealogical research."

In the course of the researches undertaken by these specialists, masses of information are accumulated of which it is obviously desirable to make the utmost possible use. If it were not arranged, classified, and co-ordinated by means of cross-references and a careful method of indexing, and preserved in some definite order so as to render it immediately available whenever and for whatever purpose it might be wanted at any subsequent time, the bulk of the information so collected would be of comparatively little value. The information sought is of many different kinds, and takes many different forms. The quest for it has to be pursued in many different places, and in different ways and in varying circumstances. There are documents to be copied, and some of them it is necessary to copy in a particular manner, involving the use of copying-paper of a special shape, size, and texture. There are maps and plans to be copied and compared. These are of varying sizes and shapes. Pedigrees, photographs, reproductions of prints and portraits, illustrations cut out from periodicals; extracts taken from newspapers containing topographical, biographical, and other data; facts of local history, and data that are likely to be helpful in the course of research; copies of entries in parish registers, of inscriptions on monuments in parish churches, on brasses on the walls of those churches or on tombstones in the adjoining churchyards: these and numerous other items add variety to the quantity and the range of the matter necessarily collected—matter which in the ordinary course, in order that it may be properly utilized, has to be specially and systematically arranged, classified, and filed.

The filing problem presented by this rich variety of material is not a simple one. Anything even approaching to uniformity

in the size and shape of the various papers that have to be preserved is altogether out of the question. There is, moreover, the further consideration of the ultimate destiny of the records. Most of these, besides serving the temporary purposes which lead to their collection, possess a value as public records which may be made available subsequently for other researchers, for compilers of future local histories, and for students and others interested in any of the subjects upon which the collected records may throw a light.

### **The Filing Requirements.**

There is a business side to this work, and the business side calls for its own arrangements. These are special. There are, and there must be, two categories of correspondence. There will be letters to and from clients fixing terms, containing instructions and explaining requirements. And there will be letters containing information, and setting out extracts from documents, books, magazines, etc. Some methodical people make it a rule to send extracts on separate sheets, accompanied by a covering letter. It would promote general convenience if the practice were universal, because where it is followed it becomes possible to file the letter with the ordinary correspondence, and to file the extract with the other relevant papers, making a brief memorandum on the letter of the destination of the extract referred to in it, and another memorandum on the extract of the source from which it was received, and the date of receipt. This would render unnecessary the process, now compulsory in many instances, of copying an extract from a letter so as to make it available for the purpose for which it happens to be needed.

As to the ordinary business correspondence, it can be filed in the ordinary way, according to any one of the methods described in earlier chapters.

Turning to the information collected, it will usually be found that this can very conveniently be grouped under three general headings; (1) "genealogical"; (2) "topographical"; and (3) "miscellaneous." As to the first of these, it is suggested

that all extracts, copies, memoranda and notes should, as far as possible, be written or typed on quarto paper, and that as different makers' ideas of the proper dimensions vary, one maker's paper should alone be used. The adoption of quarto sheets for these records will enable letters containing genealogical information to be filed with them. Genealogical information will, of course, be filed under family names, which lend themselves so naturally to a purely alphabetical and therefore self-indexing arrangement, that for this purpose a numerical scheme with its supplementary card-index may be left out of consideration. Newspaper cuttings containing genealogical information can be pasted on to quarto sheets, and filed with the other records.

One advantage of this course will be that the folders containing the genealogical collections of facts will be uniform in size with those containing the ordinary business correspondence. Where the business is small, one filing drawer may, for a time, serve the purposes of both. To prevent misfiling, the guides and even the folders may be differently coloured, the correspondence guides being, for instance, blue, the "genealogical" guides red, and the two sets of folders being, of course, kept quite distinct, each in its own alphabetical order.

### **Family Names.**

The advantageous arrangement of these for filing purposes calls for careful consideration. Families have branches, and no one family stands by itself. Intermarriages bring it into connection with other families. Removals take it from one place to another. A birth takes place in one parish, a marriage in another, and a death in a third. There are collaterals, and there are other families of the same name. For some purposes it may be desirable to keep the information as to each distinct. For other purposes it may be desirable to keep it all together. The special circumstances and the special object in view must determine the method adopted. What almost invariably happens if one sets out to construct

the genealogy of a particular family is this : you decide upon the starting-point for your researches. It may be the marriage of the parents of a living person. You determine to pursue your inquiries on the paternal side. Let us suppose you are tracing the ancestry and the relatives of Gilbert White. You get together all the information you can from every source concerning the Whites of Selborne. Before long you find it is necessary to investigate the family history of the Whites of Alton, the Whites of Farnham, and the Whites of Godalming, and other families of Whites. You find that some members of the family intermarried with members of other families which played an important or prominent part in English history. You conclude that it is desirable to gather together a certain amount of information about each of them. How shall you classify the numerous records which you will gradually amass in this way ? If you are collecting the information for the purposes of an author who intends to use the material in the preparation of a biography, you will do well to file it all in one folder, labelled with an appropriate name. If you are collecting it for the purposes of a county history, or for use in any more general way, it is better to keep apart the information relating to the several families. Thus you may file separately your records under each of the headings, " White, Selborne, Hants " ; " White, Farnham, Surrey " ; " White, Alton, Hants " ; " White, Godalming, Surrey." It will be observed that the county name has been added in each of these illustrations. It is not always necessary to do so. Nobody would think of adding the county after a mention of Manchester or Liverpool. But the genealogist's researches bring him into contact with a multiplicity of small towns and villages. One line of inquiry may lead him to many parts of the country. And place-names are duplicated in this country to an extent that would surprise anybody whose occupation has not brought him into frequent touch with the circumstance. Mention of the county will always prevent confusion.

This practice need not involve the provision of special folders for each branch of the family. Unless the records



concerning each of them are numerous and therefore bulky, it will often be possible to keep, for a time at all events, as many of them as are classifiable under a single name, in a single folder. Thus we may have one folder labelled "White," with the various contents arranged alphabetically under the subsidiary place-names. In that case, it will be a matter of little consequence that the various families whose records repose in one folder are not in fact related. Sometimes a relationship is supposed to exist which in the long run proves to have been imaginary. Sometimes it is desirable to investigate the history of several families, in order to discover whether there was any relationship between them, and a definite conclusion on the subject may be impossible till masses of information have been brought together and compared.

### **Intractable Material.**

It will be found in practice that the use of quarto sheets for all genealogical records will not be possible. There will be newspaper cuttings, photographs, old prints, illustrations from periodicals like the *Graphic* or the *Illustrated London News*, copies of deeds supplied by correspondents, and papers and documents of a miscellaneous character, too large for filing in any folder intended to contain quarto sheets. It is suggested that these should be filed with the "Miscellaneous" collection which will be discussed later. But in order that none of them may be overlooked when they are wanted, one sheet in each of the alphabetical "genealogical" folders, headed appropriately, should be set apart for the purpose of a list of all relevant papers filed elsewhere. On this sheet should be entered, as it is filed away, the name of each document relegated to the "miscellaneous" department, with sufficient indication of the title under which it is filed there, to serve as a reminder of its existence, and to enable it to be found whenever occasion arises for consulting it.

This index sheet may be utilized in such a way that its contents will in due course of time constitute a complete set of cross-references to every available record and allusion

likely to be of value for any of the purposes for which the information is wanted, or for which it is anticipated that it may probably be wanted. Thus references to the family or to any facts of the family history which are met with in biographical dictionaries, topographical dictionaries, county magazines or other periodical literature or in biographies of other persons or in books generally, may be noted on the sheet, the title of the work or the separate article, the volume and page, the edition or date of publication—and, in special instances, the whereabouts of the book, particularly if it be a rare volume accessible only at a particular library—should be noted on the index sheet.

As newspaper cuttings and illustrations vary in size, there will be a temptation to file all those which are not too large, with the ordinary quarto sheets containing records preserved together under the family name, and to keep the larger cuttings and illustrations in the “miscellaneous” collection. There are some advantages about this practice; but on the whole the balance of convenience seems to point to the method of keeping all newspaper cuttings together, irrespective of their size or shape, and of keeping all illustrations together irrespective of their size or shape. In many instances newspaper cuttings and illustrations will be available for more than one purpose, and may suitably be made the subject of more than one cross-reference.

There are various methods of dealing with those newspaper cuttings and illustrations and other material which it is possible to describe as “intractable” from the ordinary filing point of view, so that with the use of a system of cross-references the instant availability of every single item so dealt with may be ensured. These will be discussed under the heading “Miscellaneous” later on. The ordinary file, consisting of quarto sheets arranged in order and fastened together in the customary way, and preserved in a folder appropriately labelled and in alphabetical order as already explained, will now contain all written records, copies, extracts, and an index to all other records. It will not of

itself be a complete collection of information, but it will form our primary source of information relating to the family whose name it bears. It will put us on the track of whatever information has been discovered and is not contained within its covers.

To keep his record in a state of efficiency for this purpose, requires, on the part of the collector of facts, methodical habits. Too many collectors, investigators, researchers, are unsatisfactory as arrangers of the facts which they amass. They cannot begin too early or cultivate too assiduously the habit of intelligent, systematic arrangement. They will find modern filing systems will help them to acquire that habit.

### **Topographical Records.**

Not only as a collector and accumulator of facts, and especially out-of-the-way and unknown facts of local history, a "picker up of unconsidered trifles," but as an inquirer whose prosecution of the investigations incidental to his calling entails upon him the necessity of having available always for immediate use a large quantity of geographical information, the worker to whose requirements, so far as filing is concerned, this section is specially devoted, has occasion for a set of topographical records. There are, of course, bulky topographical dictionaries and county histories in which every town and village is mentioned with masses of facts and dates and names. A really marvellous amount of research and erudition has gone to the compilation of these useful works. Where a collection of such books forms part of the researcher's library, there is no need to copy out the information contained in them. The volumes will constitute a supplement to whatever topographical records may be amassed. But it is not everybody who possesses such works, or many of them. Some of them are not readily procurable; they are all expensive; and to many researchers they are accessible only in public libraries. "Topographical information" is a comprehensive term. It may include antiquarian, archaeological, geographical, geological, ecclesiastical, and industrial

only rarely are any of them wanted, the wisdom of this course is apt to be questioned. It is only a Government department that is able to accumulate everything. The later tendency of the researcher is to destroy everything or to keep as little as possible. One man who had amassed a roomful of newspaper cuttings, pamphlets, catalogues, etc., got over his difficulty by calling in a waste-paper dealer and selling the accumulations of years for a few shillings. Others have resorted to a bonfire in the back garden. Every collector will do wisely to go through his collections periodically, and destroy everything that has served its purpose or become obsolete. Nevertheless there are, and there always will be, miscellaneous records of various kinds which the researcher will find it indispensable to preserve. And when these become useless to him the local public librarian should be consulted as to whether in his opinion the collection is worth preservation at the local library. Sometimes it will prove to be peculiarly suitable for preservation in that way; and the collector may rid himself of the incubus without the pangs of regret that destruction of what he had taken such pains to amass always causes.

### **Newspaper Cuttings.**

Of what will the miscellaneous collection consist? First, there will be all those newspaper cuttings which for any reason it may seem undesirable, or which it may be difficult, to paste on quarto sheets and file with the "genealogical" or "topographical" records. A convenient plan for dealing with these is to paste each cutting on a half-sheet of paper, foolscap size. A smaller size of paper involves too much folding of the newspaper cuttings. Ordinary "newspaper" paper is too fragile to stand the strain of much folding, which should therefore be reduced to a minimum. An appropriate heading should be written or typed above each cutting, together with a memorandum stating the name of the paper from which the cutting was taken, and the date on which the article or paragraph appeared.

The sheets containing the cuttings can be kept in stout manila covers, tied round with tape. The number of sheets inserted in each cover will necessarily be limited, and it is desirable not to multiply covers unduly. Shall the arrangement of the contents be alphabetical or numerical? The advantages of an alphabetical arrangement have already been pointed out, and need not be repeated here. But there is this fact to be borne in mind with reference to the newspaper cuttings which the genealogist and local annalist will wish to preserve. One extract may relate to several families or to several of the places separately referred to in his topographical records. To be rendered available for all likely purposes, there must be cross-references to it in each of the special collections of records in relation to which it may be helpful. In view of this necessity the advocate of the numerical method comes along and urges the superiority of this scheme. "Number your newspaper extracts," he says, "in the order in which you collect them; index each cutting on an index sheet to be placed at the commencement of each file; limit the cuttings in each cover to say twenty or twenty-five; label your cover with those numbers; make as many cross-references to them in the other files as you think necessary. Your cross-references will be brief: 'N.C. 23,' will be sufficient to refer you to the particular cutting which happens to bear the number 23; you will have no more files in use at any one time than are absolutely necessary. There will be no files with one or two cuttings only, and no space will be wasted. Since you must make cross-references, the alphabetic arrangement, while it entails more labour and demands more space, is no more efficient. These arguments will carry weight with all except those who attach importance to a pedantic adherence to one method throughout.

### **Illustrations.**

Portraits, prints and illustrations, where they can be mounted, should be so dealt with. Titles should be supplied where these are not already given, and the source from which

they are taken should be indicated, with any other necessary data. The print may be a reproduction from a painting in the possession of some private person, or in some art gallery or public museum. This fact, if not otherwise stated, should be mentioned. The collection can be numbered, an index list with titles and numbers made out, and the index sheet and the mounted portraits, prints, and illustrations kept in portfolios or in covers similar to those suggested for newspaper cuttings. They may be made readily available by means of appropriate entries in the files containing records under family names and place-names.

### **Other Miscellanea.**

Pamphlets can be kept together, odd numbers of magazines, local guide books, monographs on old country houses and all similar works being treated for this purpose as pamphlets. These may be kept on bookshelves. An index volume containing a list of them will be useful, and cross-references such as have been already suggested will add to their value. They can be numbered consecutively if wished, each number being entered in the index volume. Numbering will, of course, facilitate easy reference. A card index can be used in preference to an index volume.

Maps and pedigrees being of various sizes, very often large, call for special treatment. It is usually desired to avoid folding them as much as possible. Where they can be kept unfolded a flat or horizontal scheme of filing, such as has been described in an earlier portion of this chapter, may be recommended.

### **Vertical Filing for Large Documents.**

One object of the present chapter has been to show the possibility of combining the several advantages of diverse filing methods. With unlimited space at command it is possible to adopt a uniform plan for all purposes. But the question of space is one that the ordinary man finds it imperative to consider. For large documents a horizontal

filing scheme has some conspicuous advantages. But it is due to the inventors and makers of vertical schemes to mention that they have faced the problem of the large document. Architects, surveyors, engineers, who have constantly to use large drawings; stockbrokers who have to file stock certificates and share certificates, some of them needlessly large in size, and all workers whose duties involve the preservation of large maps, plans, and large photographs, are able, if they wish, to adhere to a scheme of vertical filing throughout. There is one file on the market which is constructed to take papers up to a maximum of 30 inches by 22½ inches. The file is really a box, with a lid and a side flap. It is 3 feet 6 inches long, 2 feet 10 inches wide, and stands 3 feet high, so that when it is closed it can be used as a desk. The filed papers, etc., are divided by substantial covers with guides with various coloured labels.

## CHAPTER XIII

### ADAPTABILITY OF MODERN METHODS

It is a circumstance entirely in favour of any device for accomplishing work that is felt to be necessary or desirable, that it is so planned that it can be easily adapted to suit the varied requirements of a multiplicity of callings and purposes, and further, that an alteration or extension of any particular business to which it has been applied, or the amalgamation of two or more businesses, will not render the system useless or inapplicable. It can fairly be claimed for modern filing and recording methods that they comply with this condition. It is possible for the man with a small correspondence and the man with a huge correspondence to employ exactly the same filing method. The one man will need fewer folders, fewer drawers or trays, and fewer filing cabinets than the other. But both will be equally able to find readily any letter or other paper which has once been filed. For private purposes, and for professional purposes, for the purposes of the manufacturer, the distributor, and the agent, the same general method, so far as fundamentals are concerned, will suffice. There exist the same possibilities of alphabetical arrangement, of numerical arrangement, and of a combination of these plans, the same possibilities of distinction by colour, the same possibilities of a purely geographical scheme wherever it is needed, and the same possibilities of a suitable indexing scheme.

It may be well to illustrate the manner in which the method of employing cards, loose-leaves and books prepared on the transferable leaf system, may be adapted to a few special purposes. And let us take first, for simplicity sake, one of the most ordinary of these. Let us see how a card system



would serve the purpose of the private investor. As a rule, the private investor is not very systematic in keeping records of his investments, the receipt of dividends upon them or of his profits or losses. Executors and their solicitors, and beneficiaries under wills often have good reason to know that this is so. Unnecessary trouble is given after an investor's death, and his estate is reduced by expenses that could have been avoided if the deceased had cultivated the habit of keeping systematic records of his property and of his doings with it. The card-system lends itself readily to his purposes.

### **The Private Investor's Records.**

On a card or loose sheet the investor, as soon as he acquires stock or shares, may enter all the necessary particulars. The heading will be the title of the stock or the name of the company in which he has acquired an interest. He will record also the price at which he purchased, the total cost, the dates for payment of dividend and interest, and other information. One or two illustrations will show how much desirable information he can gather together in this way in a small compass. Let us suppose his purchase to be in India  $3\frac{1}{2}$  per cent. Stock which he bought at  $98\frac{1}{2}$ ; he will enter upon his card the following particulars—

“ £600 India  $3\frac{1}{2}$  per cent. stock.

Bought 29th Nov., 19.., at  $98\frac{1}{2}$ .

Dividends due 5th Jan., Ap., July and Oct.

Sold                    19    at

Profit (or Loss) on sale £                    .”

If he is in the habit of preserving his stockbroker's accounts, he will add a memorandum referring to the account on the purchase, and when he sells, a similar memorandum referring to the account on the sale and showing the whereabouts of each.

Or suppose that he applies for shares in a new company, on their issue by the company. He receives an allotment, and subsequently pays up the successive calls, and in due

course comes into possession of the share certificate, and then places it in a tin box which he keeps at his banker's. His card record may very usefully show every step in the transaction. Here is a possible method—not the only available method, but one which is at all events complete in itself and will serve to suggest what is essential—

	Date.	Paid.
Johnson's Patent Food, Ltd., Registered Office, 375 Cheapside, E.C.3		
Application for 500 £1 ordinary shares sent	21.1.24	£50 0 0
Allotment Letter No. 295 for 400 Shares received . . . . .	28.1.24	
Paid Allotment Money . . . . .	30.1.24	150 0 0
First call (paid) . . . . .	29.2.24	100 0 0
Final call (paid) . . . . .	30.3.24	100 0 0
Shares Nos. 35600 to 35999 . . . . .		<u>£400 0 0</u>

Share Certificate No. 419, dated 10.4.24, received 16.4.24; deposited at bank 18.4.24.

Here, it will be seen, he has full particulars of all his payments and of the numbers of his shares, and a note showing the whereabouts of the share certificate.

He may, of course, enter up similar information when he takes up stock of a foreign government, on an issue of such stock in this country. In that case he will record his application, receipt of the allotment letter, its number, the date on which he exchanges the allotment letter for provisional scrip, the date on which he receives his stock certificate, the dates on which dividends become due, the number of the stock certificate, and the date on which he deposited it with his bankers.

The same procedure will, of course, be gone through when he acquires debentures or preference shares. He can then see at a glance exactly how he stands. The relevant cards can be filed away in alphabetical order in a small drawer made or adapted for the purpose, and the information will be available for the investor himself throughout his life or

for his representatives after his death, immediately it is wanted. And it will be complete.

He may usefully keep another set of cards, these relating to income. Suppose that the whole of his income is derived from stocks and shares: a separate income card in respect of each specific investment will be useful.

Such a card, so far as the India Stock is concerned, will be very simple. It will be headed like the card recording the expenditure of capital in purchase of the stock. Its purpose, however, will be to record the receipt of successive dividends. Something like the following will effect this purpose sufficiently—

£600 INDIA 3½ PER CENT. STOCK.

DIVIDENDS QUARTERLY.

	Amount.			Tax.			Net sum Received.		
	£	s.	d.	£	s.	d.	£	s.	d.
19..									
Jan. 5	5	5	0	6	2		4	18	10
April 5	5	5	0	6	2		4	18	10
July 5	5	5	0	6	2		4	18	10
Oct. 5	5	5	0	6	2		4	18	10

It is always desirable to record the actual amounts deducted on account of income tax with the object of being able to ascertain at any time how much has been paid in this way in the course of a fiscal year. When an account has to be made out for the purpose of claiming repayment from the Income-tax Commissioners, the total sum will be easily arrived at by the simple process of copying out from the various cards the several deductions recorded upon them for the period in respect of which the right to an abatement is to be shown.

Or suppose that one of the investments consists of a holding of 400 ordinary shares in the joint-stock company known as Johnson's Patent Food, Ltd. The income received from time to time in respect of these shares may be recorded on a card in the following manner—

**JOHNSON'S PATENT FOOD, LTD.**  
**400 £1 Ordinary Shares, Nos. 35600 to 35999.**

Dividends.	When paid.	Rate per cent.	Amount.			Tax.			Net received.		
			£	s.	d.	£	s.	d.	£	s.	d.
To Dec. 31, '21	19.3.21	10	40	0	0	2	6	8	37	13	4
„ '22	11.4.22	8	32	0	0	1	17	4	30	2	8
„ '23	21.3.23	6	24	0	0	1	8	0	22	12	0
„ '24	17.3.24	10	40	0	0	2	6	8	37	13	4

These records speak for themselves. The time occupied in making the successive entries is infinitesimal. All that is needed is the habit of making the entry as soon as the cheque arrives, or at the time one is filling up the "paying-in slip" preparatory to paying the cheque in for collection by the bankers. The information is in a compact form, and particulars which would not otherwise be accessible without a long search can be ascertained at a minute's notice.

How useful such a record would be will be realized by any person who has invested in the "Cumulative Preference shares" of a company which for several years has been unable to pay its preference dividends or has paid them in part only. The preference shareholder is entitled in certain circumstances to claim against the company or its assets for the whole of the preference dividend in arrear on his shares. When the time arrives for him to make such a claim he is often involved in a long and troublesome search. For lack of proper records he has to spend considerable time discovering the date on which he last received a dividend on the shares, and the amount of it, and up to what date the dividend was calculated. If he had kept such a record card as has been suggested he would be able to ascertain the fact at a glance, and the calculation of the sum owing to him would be a comparatively simple and easy matter.

An investment may take the form of a bond to bearer with coupons attached ; and the investor may have adopted the

common custom of entrusting the bond to the care of his bankers with instructions to collect the interest as it becomes due, the bankers for this purpose detaching and presenting the coupons at the appropriate dates and crediting the customer's account with the sums that they receive. The customer's only notice of the payment having been made consists of the entry of the item in his pass-book. In order to keep a complete account and to be in a position to check his bank book and satisfy himself that the interest has been received at the proper time, the investor should make out an income card, setting forth the dates on which the several coupons are payable. He will already have noted on his investment card the fact that the bond has been handed to his bankers for collection of the dividends. He will want a column for the due date, another for the date upon which credit is given to him in his banking account, and of course, the usual columns showing the gross amount, the tax deducted, and the net sum received. A card can be readily framed on the general plan of those already set out.

Debenture interest, which is payable on fixed dates, may be recorded in precisely the same way, whether the amount be received direct by cheque or be paid to the bankers and credited in the banking account. In this case, too, there is the possibility of the interest falling into arrear and of its becoming necessary to make a claim for the arrears. The card will show at a glance from what date the necessary calculation is to be made.

### **House and Landed Property.**

The investor may be a man who regards house property or landed property as the only safe security or as the best possible security for his savings. It may be his custom to purchase the property or to lend money to others on mortgage of it. In either case he may be recommended to utilize investment and income cards.

It will be desirable, whether he be a purchaser or a mortgagee, that the investment card—that he keeps should contain

fuller particulars than are necessary as regards stocks, shares, bonds or debentures. In most cases he will not keep the relative deeds in his own personal custody. He may lodge them with his bankers, deposit them in the vaults of a safe deposit company, or leave them in the charge of his solicitors. There are various facts about the property which he will require from time to time to know. Those facts, recorded briefly on his cards, will save him occasionally the cost and trouble of a journey or the expense of a solicitor's letter.

Here are two specimens of the kind of cards which will be found useful.

[INVESTMENT CARD.]

296 Hunter's Road, Willesden.

(Freehold) purchased 27th March, 19.. Price £750.

Tenant, John Smith.

Rent, £45 payable quarterly.

Term, 3 years from 25th Dec., 19..

Tenant pays rates.

Landlord repairs.

Insurance £600 in Law Life Office.

Policy No. 256714.

Premium 9s. payable Michaelmas.

Deeds in box at Westminster Bank (Paddington).

If the property be leasehold, the leasehold term and the ground rent and the name and address of the ground landlord or his agent, will be added.

[INCOME CARD.]

296 Hunter's Road, Willesden.

Tenant, John Smith—Rent £45 (Tax assessment £40).

Due.	When Paid.	Amount.	Tax. Deducted.	Net Amount.
19..		£ s. d.	£ s. d.	£ s. d.
Mar. 25 . . .		11 5 0	2 6 8	8 18 4
June 24 . . .		11 5 0		11 5 0
Sept. 29 . . .		11 5 0		11 5 0
Dec. 25 . . .		11 5 0		11 5 0

A mortgage investment may be dealt with by the following cards

## [INVESTMENT CARD.]

Borrower: W. Brown, Caxton Lodge, Enfield.

Advance: £400 (date 21st July, 19..).

Interest 5 % (21st Jan. and 21st July).

Security: Freehold houses, 491 and 492 High Street, Edmonton, let at £30 and £32 to yearly tenants.

Fire Insurance £600 in Law Fire Office. Premium 12s., payable 25th Mar. Policy No. 251,362.

Deeds at Westminster Bank, Paddington.

## [INCOME CARD.]

W. Brown, Caxton Lodge, Enfield.

Mortgage for £400 at 5 %.

Interest due.	When paid.	Amount.	Tax deducted.	Net amount received.
19..		£ s. d.	£ s. d.	£ s. d.
Jan. 21 . . .		10 0 0	11 8	9 8 4
July 21 . . .		10 0 0	11 8	9 8 4
19..				
Jan. 21 . . .		10 0 0		
July 21 . . .		10 0 0		

If cards are not liked, one of the cheap loose-leaf books in a suitable " binder " can be procured and pages in it can be ruled in any way to suit individual requirements. When property is sold or a mortgage is paid off, the relevant investment and income cards or sheets can be withdrawn from the collection in use and either stored away for possible reference thereafter or destroyed.

The merit of keeping records in this fashion is that the man who does so can satisfy himself at any moment how his investments stand, what is the total amount of his invested capital, what is the amount of his income, what sum he is paying for tax, and what amount is owing to him.

### An Investor's Outgoings. Reminders.

The investor whose capital is represented wholly or chiefly by house property will have periodical payments to make. There will be annual payments of premium in respect of fire

insurance. There may be rates and taxes ; and in the case of leasehold property there will be ground rent, in many instances payable half-yearly. He can readily furnish himself with cards or " loose-leaves " which will serve the purpose of " reminders." If his investments are not numerous four cards may suffice, respectively headed " Lady Day," " Midsummer," " Michaelmas," and " Christmas." On the Lady Day card he will enter the number of all policies the premiums on which become due on that day, the names of the offices to whom they are payable and particulars of the property which they concern. He may also enter upon the same card the necessary particulars as to all ground rents payable at Lady Day, stating the amount, the name of the person to whom it is to be paid, and the property in respect of which it is payable. A separate card will be similarly kept for each of the other three quarter days. If his periodical payments are numerous he can easily apply the same method by using one card every quarter for insurances alone, another for ground rent, and another for any other payment falling due that quarter ; or he can, of course, utilize several cards, where necessary, for any one of those items.

### **The Advertiser.**

The business man who advertises his goods, whether his advertisements be numerous or few, will find modern methods help him materially. A register of advertisements kept by cards will enable him to ascertain at any moment how he stands in regard to his advertisements. The cards may be arranged alphabetically according to the names of the periodicals in which the advertisements appear. Each card will contain the name of the periodical, the date at which the advertisement was ordered, the name and address of the advertising agent, how many insertions have been ordered, the charge for the advertisement, the amount of discount, if any, allowed for prompt payment, the stated circulation of the paper on the strength of which the advertisement was given, and any other particulars thought desirable. There



may be a space for the number of orders known to have been received or the number of inquiries that have come to hand in response to that particular advertisement. There may be a memorandum as to whether it is thought wise to continue or discontinue it ; and if the advertisement be a short one a copy of it may be pasted on the card. In most cases, however, especially if the advertisements be numerous, a separate file of copies of them should be kept, and the card will contain a reference to the relative file.

### **Goods Sold on the Hire System.**

When goods are sold on the hire system, the purchaser being treated as "hirer" only until he has paid an agreed number of instalments on specific dates, it often becomes necessary to satisfy oneself of the position of each separate account. There will, of course, be a file of agreements, kept either numerically or alphabetically. A card, which may serve at the same time the purpose of an index to the filed agreements, may contain the name of the hirer, the necessary reference to the agreement, and in one column the dates of the various instalments payable, and in another the dates on which each instalment is actually paid. There may be a column for the dates of any applications for payment. Here will be a concise summary of every transaction.

Goods are in many instances not sent out on hire in this manner until after "references" have been furnished, and inquiries made of them and satisfactory replies received. Wherever this procedure is gone through the card should record the names and addresses of the "references," and should mention where or under what letter or number or other distinguishing mark their replies are filed.

In the case of hire agreements various practices prevail. Some firms which stipulate for monthly payments, arrange that the payments of all hirers shall become payable on the same day in the month. The arrangement simplifies the task of collection. The one set of cards already suggested will serve all the purposes of "reminders." There need be

no supplemental cards to "jog one's memory" as to the date on which application is to be made for payment. If a hirer gets into arrear, his card can be transferred to a special drawer labelled "hirers in arrear," so that the collection of the arrears may receive effective attention; and when any particular hirer's arrears are cleared off, his card will, of course, be returned at once to its normal place.

But the method of making all payments fall on one day in each month is not very extensively adopted. It hardly fits in with the arrangements of many businesses or with the convenience of customers; and the ordinary plan results in there being payments to collect on many different days in every month. Payments may, in fact, fall due on every day in the month except Sundays and Bank Holidays. In order that a watchful eye may be kept on every single transaction and that all necessary steps may be taken to obtain payment of each instalment as it becomes due, there should be a series of special cards which may serve the purposes of "reminders." One card will be allocated to every person whose payments become due on the first day of the month. The card will bear on it the name and address of the hirer, a reference to the number or other indication of the hirer's "general" card, and a statement of the amount of each instalment, and of the period during which the instalments are to continue payable. "£3 5s. 0d. monthly till 1st January, 19. .," will serve as an indication that the card is to cease to be brought forward when the monthly instalment due on 1st January, 19. ., has been paid. Assuming that the "general" card contains all the information already suggested, this "reminder" card need not at starting be burdened with any further particulars. There will be a column in which will be recorded the date on which each payment is actually made. All the cards concerned with payments falling due on the first of the month will be kept together, and will be gone through on the first of every month. When the January payment is made in respect of one of them the fact will be recorded and the card will be forthwith transferred to its place among the

cards showing payments becoming due on the 1st of February. When the February payment is made and is recorded the card will go forward to the 1st of March. And so on throughout the year. The monthly record will consist of a few figures only, such as "1.1.24," "1.2.24," etc., the time involved in noting these being infinitesimal.

There will be a similar set of cards for each day of the month. One series of cards with guides numbered consecutively from 1 to 31 will answer the purposes of the whole year and may indeed be "perpetual," because a new card may be inserted at any time immediately a new transaction is entered into, and the one card may serve as a "reminder" until all the payments, over however long a period they may extend, have been made. When the last payment has been made the card will be withdrawn and disposed of according to the practice of the office in regard to "dead records."

Two difficulties arising out of the peculiarities of the calendar will suggest themselves at this point. First, there is the fact that any date in a month may happen to fall on a Sunday. A payment due, say, on the 4th of the month will, therefore, in some months be, strictly speaking, payable on a Sunday. Usually such a payment is in practice treated as due on the following Monday. Every Monday morning there will be two sets of cards to look through—those bearing Sunday's date and those bearing Monday's date—that is all. The same practice will of course be pursued as regards Bank Holidays. And then there is the troublesome last day of the month. Our months have "ragged endings." In February a payment stipulated to be made on "the last day of every month," and therefore normally payable on the 29th, the 30th, or the 31st of the month, will become payable on the 28th, unless the year happens to be a Leap Year, in which case the payment date will be the 29th. In April payments normally liable to be made on the 31st will be collected on the 30th. This, again, need not involve any special arrangements or occasion any real difficulty. On the 28th February, when that happens to be the concluding day of the month, all the

cards for that date and for the 29th, 30th and 31st will be looked through and dealt with.

The fact that a card continues in its place under a past date in the current month is an indication that the hirer to whom it relates is in arrear with his payment. It stands as a "reminder" of that circumstance until the payment is discharged. At the end of the month an alphabetical list may be made of all payments still in arrear, so that these may be dealt with in whatever manner may be thought advisable, and the ordinary "reminder" card transferred to its normal place among the new month's set of cards.

Where the transactions are so numerous as to necessitate greater sub-division of work among the staff than the foregoing remarks have implied, the method suggested lends itself easily to adaptation to the requirements of the office. For instance, it may be found desirable with the object of getting in the arrears promptly that these shall be dealt with by a separate member of the staff and that the cards relating to payments in arrear shall be kept together but apart from those concerned with instalments becoming due during the current month. All that is necessary in that case is to provide a separate drawer labelled "Arrears," and to transfer to that drawer every card showing that a payment has not been made on the due date. No new cards are needed: no further entries are needed. If payment of any instalment is not made at a stipulated date the card will be transferred to the "Arrears'" drawer, arranged there with others in alphabetical order, be attended to in due course, and when the arrears are cleared off the card will be replaced in its place in the ordinary monthly set to serve as a reminder on the day on which the next instalment becomes due.

### **Generally.**

It would be possible only in a work of encyclopaedic dimensions to illustrate the adaptability of modern filing methods to the special needs of every separate profession or business, and to every branch of each separate business. The physician

is enabled to record promptly on cards or on "loose-leaf" sheets, arranged in alphabetical order, the names of his patients, the dates of their consultations with him, his notes of their complaints, of his prescription and other facts that he feels it desirable to record, the fee and when it was paid, and so on. If these are kept in proper alphabetical order he will be able to put his hand upon the record instantly when the patient calls a second time. How superior this plan is to that of

[illegible]

"REFEREE" CARD FOR MEDICAL MAN (PARTRIDGE AND COOPER)

making entries in succession in books, keeping an index and having to hunt up an old entry whenever it becomes necessary to refer to what was done in the past ! And it enables an avoidance of all need for repeating names and other recorded information on making a second entry. The same thing is, of course, true of surgeons. And the card entries may in their case be quite readily supplemented by a subject-index worked on the plan suggested in a previous chapter.

Or take the case of the dentist. He, too, may make his entries on cards or on loose-leaf sheets. One ingenious

“modern-methods” man supplies loose sheets, which are intended to be kept in a binder, with a complete chart of the teeth, each tooth being numbered and so arranged that the work done on any part of any single tooth can be marked on the chart. The customer’s name, the kind of filling employed, or the plate supplied, or the extraction or other professional service rendered can be shown on the card with surprising brevity, with dates, particulars of fees and of payment. Everything relevant to any one transaction appears on the one card or loose sheet.

Records can be kept in a similar manner of goods ordered, the card or loose sheet showing in appropriate columns the date of the order, the quantity and kind of goods ordered, the price to be paid for them, when they are to be delivered, when they actually are delivered, by what route or through what agency they arrive, who is to pay the carriage, the amount if paid by the recorder, when the goods are to be paid for, on what date payment is actually made, and any other necessary particulars.

A man gets quotations from a number of firms for some particular articles which he requires for the purposes of his business or for other purposes. A record of these, giving the names of the firms from whom quotations have been received, the prices or terms quoted, etc., will serve the double purpose of making a comparison between the various quotations easy and permanent, and of simplifying reference to them. There will be no necessity to wade through piles of correspondence to ascertain the respective terms offered; the whole of the terms will be there classified available for comparison at any time.

Membership lists with dates of subscriptions becoming due and of subscriptions paid can be kept on similar lines by secretaries of societies of all kinds. And the cards or loose sheets can be arranged or filed so as to serve as a register of members, and as a reminder of those in arrear with their subscriptions. Subscribers to charities can be classified in the same way.

Workmen's time sheets ; records of stock purchased, of stock manufactured, of stock used, of stock sold or forwarded to branches or to agents for sale ; details of costs of manufacture, costs of handling goods dealt in but not manufactured by the firm, costs of clerical service, and of all the miscellaneous items of which a record is necessary for the purpose of modern systems of "costs accounting," can easily be kept on the general plan of modern filing methods. Indeed, if what is wanted is to get an effectual and a complete analysis or the results of such an analysis so as to show the precise proportion which cost of production or cost of distribution bears to the entire receipts or to the entire expenses of the business, the card or the loose sheet specially prepared to take in appropriate columns under appropriate headings, all the details that go to make up the required total, is without any satisfactory rival.

## CHAPTER XIV

### ACCOUNTS ON CARDS : LOOSE-LEAF LEDGERS

MANY firms nowadays keep their accounts entirely on cards or in loose-leaf ledgers. It is impossible here to enter upon a detailed description of the scheme, for that would involve something like a treatise on book-keeping, with its many modern special applications to the needs of special businesses. All ledger accounts can, of course, be kept on cards or loose sheets arranged alphabetically, the same method of book-keeping being employed as would be followed if the entries were made in the huge, bulky volumes of the past. Accounts of current receipts and of current expenditure may be kept in this way; and the tabular and self-analysing methods lend themselves to it quite as easily as other methods. It is sometimes objected by adherents of the old "big-book plan," that whatever delay the old method involved in handling and opening the large volume, turning to the index, finding the number of the folio, and then turning up the account, it was a safe method. Once an entry was made in the book, there it remained; any attempt to alter it could easily be detected. But what is there, it is asked, to prevent the removal or destruction of a card or of a loose sheet? What is there to prevent the substitution of a fictitious card for the purposes of the audit? And there are other queries with which the advocates of modern methods are only too familiar.

To these "posers" there are several very conclusive answers. In the first place, modern methods do not claim to be absolutely fraud-proof. No system of book-keeping has yet been devised, and it is safe to predict that no system of book-keeping will ever be devised, that can honestly be said to be entitled to that description. The utmost that the most perfectly contrived system can accomplish in this direction is to make successful fraud exceedingly difficult. Some of the cleverest frauds that have been perpetrated and



concealed through the deliberate falsification of accounts have been successfully concealed simply because the perpetrator was a man with a thorough grasp of every detail of the entire system of book-keeping in use and was in a position to control the entries at every stage and in every book, and to destroy documentary evidence outside the books—evidence which, if in existence, would throw light on the accounts. It is not always the cashier or the book-keeper who is the perpetrator of a fraud of this kind. Sometimes it is the employer himself to whom an untrue account may in certain circumstances be personally advantageous. Successful fraud by means of book-keeping requires considerable skill, great alertness, and continual vigilance. A momentary neglect of a small necessary precaution may lead to detection of the whole scheme. Book-keeping by means of entries in large bound volumes has never prevented fraud; and it is not likely that entries made on cards or “on loose sheets” will be more successful. But it is demonstrable that the latter do not offer any greater facilities for the perpetration of fraud than do the former.

### **Precautions against Fraud.**

What are the ordinary precautions against fraud, the methods that make it exceedingly difficult? The first and commonest of these rests on the obvious fact that most fraudulently disposed persons do not desire to have accomplices. Where each transaction passes through several hands, and each person has his own records to keep, there cannot be any untraceable falsification without collusion between two or more of them. The deliberate suppression of all traces of a transaction and of all trace of any payment having been made or received in respect of that transaction are in some instances possible, as every auditor knows. But such suppression is deliberate from the outset, and it is carried through carefully and systematically. It is the outcome of clever cunning. It is just as possible when book-keeping is rigorously confined to big bound volumes of the old type as when cards or loose leaves are used. Auditors who know their

business are aware of the ordinary forms which attempts at falsification take; they know what are the signs that point to the probability of falsification; they know what steps to take to trace it; they know what system of checks to recommend with a view to preventing it.

Let it be conceded that a card or loose sheet may be deliberately destroyed just as a letter or a voucher may be destroyed. But this will seldom by itself effect the purpose. The ledger entry is not the only record of a transaction. Rather it is the culmination of a series of entries. Double entry supplies an additional check; and it supplies that check quite as effectually where cards or loose-leaves are employed as in other instances. Verification of the entries is equally important in both cases. The destruction of a ledger card or of a loose sheet should no more prevent the detection of fraud than the omission to enter a customer's account in the ledger. The effect is the same: a particular account which ought to be there is not there. The substitution of an altered card or an altered loose sheet is in effect no different from the deliberate omission of an item from a ledger account or the deliberate entry of wrong figures in such an account. These are only two methods adapted to varying circumstances, of seeking to reach the same result. Where skilful collusion exists between various members of a staff the suppression of an item may in some instances be so cleverly carried out as to escape discovery by a keen and systematic auditor. In some special circumstances the suppression of an item to conceal the defalcation of a single member of a staff may be possible without detection, and even where there is no collusion with other members of the staff. But these instances are rare. The destruction of a card or a loose sheet or its withdrawal and the substitution of another with wrong entries upon it should not render them more numerous.

### **Cards and Loose-Leaf Ledgers Compared.**

There is an important difference between ledger cards and ledger loose sheets. When accounts are kept on cards each

card must individually be withdrawn from the drawer every time an entry has to be made upon it. There is no similar necessity in the case of loose-leaf ledgers. The separate sheets of which the latter are composed are usually and should always be kept locked securely within binders. The principal can himself keep the key, or he may entrust it to a manager so that no sheet can be removed from the binder except in his presence and with his full knowledge. All the necessary entries may be made by the book-keeper in precisely the same manner as in the ordinary ledger. Entries can be made and accounts can be copied without its being necessary to remove any of the sheets. The binder will need to be unlocked when it is required to withdraw an account because it is closed, or when it may be desired to distribute the accounts among several members of the staff to get out a trial balance quickly. It will be unlocked to insert a further supply of sheets. Otherwise there will seldom be any need to unfasten it. Normally it will be to all intents and purposes a bound volume with the advantage that its bulk will be smaller than that of the book which contains dead accounts and many blank pages and parts of pages left blank.

There are several varieties of such "ledgers" now on the market, some with large pages, some with small pages little larger in size than the ordinary card, some ruled in the ordinary way and others ruled on the "self-balancing" principle. They pass under various names: "perpetual ledgers," "loose-leaf ledgers," "life-leaf ledgers," etc. As far as one can gather their use is spreading much more rapidly than the practice of keeping ledger accounts on cards.

### **Generally.**

There is now in existence a large body of experience gained by business houses, many of them large and important commercial firms, which have adopted modern methods for the purposes of keeping their accounts. That experience can hardly be said to confirm or to warrant the distrust felt by old-fashioned accountants and others unfamiliar with the



## CHAPTER XV

### HELPS AND HINDRANCES

IN deciding what appliances to install for the purpose of filing papers, of preserving them temporarily for dealing with before they are filed, and for storing any index to them that may be needed as part of the system selected for use, one is confronted with several practical problems. The furniture must fit the requirements of the business. It must accommodate itself to the size and shape or to the respective sizes and shapes of the papers and documents intended to be preserved. And it must not only suit present requirements, but it must also either be such as to meet all future requirements or be capable of expansion and extension from time to time to suit those requirements, without detriment to the successful application of the system.

One serious question concerns the sizes and shapes of the trays, drawers, cabinets or other receptacles in which the filed papers are to be stored. And it is a question that deserves some consideration. If commercial or professional papers were uniform in size and shape certain existent difficulties would disappear. If they were even approximately uniform in size and shape existent difficulties would be greatly reduced. Business men can do much to diminish the lack of uniformity, a lack which becomes more and more obvious as the use of modern methods extends. A large part of the trouble which results from this lack of uniformity is easily removable, and where it cannot be wholly removed at present, it can be mitigated. It will be attended to as soon as the mercantile and professional world come to realize that the absence of a possible and a desirable uniformity causes inconvenience and waste of time all round, and further that it leads to a needless and avoidable increase of expense in installing a filing system.

Let us consider very briefly the nature of the difficulty and the feasibility of a remedy.

### **The Need for Standardization.**

The very modern verb "to standardize" was coined to describe a method to which makers of complicated machines attach great importance in these days. Machines and instruments of various kinds are not only made of fixed or "standard" sizes, but being made up of parts each one of which is constructed separately, it is possible and it is conducive to economy of manufacture to make each part of a fixed or "standard" size also. Any one part can be manufactured in any quantity without reference to what is being done in another department of the same works with regard to the production of other parts. Whether the machine be a watch, a typewriter, a cash register, or a printing machine, there are some parts that wear more rapidly than others. When this happens the efficiency of the machine is impaired. If the particular part specially affected by wear and tear cannot be replaced, it may be necessary to "scrap" the entire machine and incur the expense of obtaining a new one—a costly process in the case of any complicated mechanism with many parts. But if all the parts be made in standard sizes, a new part can at once be secured which will exactly fit the machine and will prolong its life and usefulness for many years. Moreover, the standardized parts of a number of similar machines can be packed in a comparatively small compass for transmission by rail or by steamship to distant places at home or abroad and can be "built up" on arrival from simple directions. It is an inducement to a man to buy a machine if he knows that as soon as any single part of it becomes useless or ineffective that part can be readily replaced. Thus "standardization" has been proved to promote economy in manufacture and in cost of transmission, economy in upkeep and a willingness to purchase on the part of potential users. It benefits manufacturers, salesmen, agents, retail dealers, and buyers and users alike.

### **Standardization in Official Departments.**

The notorious tendency of all official departments to insist upon the adoption of routine methods wherever possible, in large matters and small, led long ago to a sort of standardization of the size and shape of official papers. Whatever is to be said for or against the cumbrous and complicated filing schemes in use in many Government departments the very employment of them created a great inducement towards "standardization" of official papers. And the practice extended to correspondence, which whether it be written or typed, is produced in the Government office on half sheets of foolscap. In the Bankruptcy Court all the papers relating to each individual bankruptcy, no matter how numerous they are and however varied they may be in character, are kept fastened together on a single file. This circumstance led to the issue of a rule regulating the size and shape of all papers to be used in bankruptcy matters; and law stationers prepare all bankruptcy forms of the prescribed size and shape. A similar method of filing is adopted in the department dealing with the winding up of companies, and similar regulations exist fixing the size and shape of the papers to be used. Various regulations exist as to the size and shape of affidavits and other documents that have to be filed in the High Court of Justice; and the official forms of notices, summonses, orders, etc., are all printed on sheets of that particular size. Other "official" examples could be quoted, but enough has been said to show that the principle of standardization has penetrated into the official departments of the country, and that the principle has been adopted from a desire to facilitate the work of a chosen filing system.

### **Standardized Commercial Correspondence, etc.**

Modern methods favour placing letters in folders, either bound together by a metallic arrangement forming part of the folder or fastened together by some more or less simple device. But letters are not all of the same size or shape. The old practice before the typewriter invaded the office was

to write short letters on "note-paper," in some cases very short letters on half-sheets of "note-paper," and long letters on "letter-paper." "Letter-paper," so-called, varied slightly in size, but was approximately of the size familiarly known to every typist nowadays as "quarto." There was, however, no standard size of "note-paper." There is no standard size of note-paper at the present time. You may receive from a single business house three successive communications relating to a single transaction, and every one of them of a different size from the other two. It is almost superfluous to point out that these variations create difficulties in filing.

The mercantile and the professional community favour more and more the quarto half-sheet for all the purposes of correspondence. This disposition has been brought about for the most part, unconsciously, by the increasing use of the typewriting machine. The quarto half-sheet suits all machines. Yet manufacturers of typewriting paper have not achieved complete uniformity as regards the size of the quarto page. The differences that exist do affect to some extent the convenience of individual typists; but they seldom amount to more than an eighth of an inch in the length or the breadth of the paper; not sufficient to occasion any serious difficulty in filing. But there are still firms, which, although they use the typewriter for the purposes of correspondence, continue to produce their letters on sheets and half-sheets of paper of various sizes. It can only be inferred that they employ some particularly old-fashioned method of filing business papers. Nevertheless even they may be reminded that they would consult their own convenience as well as the convenience of others if they would employ uniformly the quarto half-sheet for all the purposes of their office correspondence. Perhaps they copy their letters in the old-fashioned letter-book and do not file copies of their outgoing letters with the incoming letters to which they relate. But they should remember that their outgoing letters are other people's incoming letters, and that those other people may desire to file them.



The preponderance of the practice of employing the quarto half-sheet for correspondence has determined the size and shape of the " folder " that most makers of " filing appliances " supply nowadays, and that circumstance should be an additional incentive to the further extension of the practice until we reach the very desirable stage of the commercial letter of absolutely standardized size and shape.

But even that will not altogether solve our difficulties. Most of us wish to file other things with our correspondence. We receive post cards, and we receive telegrams, and these have sizes and shapes of their own. The fact that we need to file them makes it necessary to fasten our correspondence, or let us rather say, the contents of our correspondence file—together. There are advocates of certain advertised filing systems who will tell you that it is unnecessary to fasten your letters together. They argue that any kind of fastening involves " mutilating " a letter. This is an exaggeration. The elaborate binding systems that some makers provide are unnecessary as a rule for the correspondence file. But there are many easy methods of fastening papers together effectually without mutilating them or making it in the least degree difficult to read the whole of their contents. Where all the papers are of precisely the same shape and size they may safely be filed by merely being placed one on top of another in order of date. But where they are of varying sizes, shapes and thicknesses, the small documents can only be kept in their place where fasteners are used. Post cards and telegrams will slip out of their place and will give trouble if they are not annexed to the letters.

Business men may consciously help to simplify and facilitate the filing of correspondence and allied papers by arranging for uniformity of size and shape as regards all the other papers that they intend to keep with the correspondence. Records of telephone messages arriving at the office may, for instance, be kept on quarto half-sheets for convenience of filing with the letters. A similar practice should, of course, be adopted for the records kept of telephone messages sent

out from the office. Printed forms with blank spaces for inserting the names of the firm from whom the message arrives or to whom it is sent, and of the person who dispatches or receives the message, the time at which it is sent or received, the nature of the message, and so on, are desirable. The existence of these, a supply of which will always be at hand beside each telephone receiver, will prevent the slovenly habit of jotting down messages on odds and ends of paper.

Notes of interviews are often filed with the correspondence, perhaps the most suitable place for the majority of such notes. These, too, should be written or typed on quarto half-sheets for convenience of filing.

By always bearing in mind in this way the needs of the filing scheme and the importance of making it as efficient, as easy to use for filing and for consulting, as possible, the business man will be able to effect a great deal of very useful standardisation. His experience will soon satisfy him that even approximate standardization, standardization carried to the utmost point of completeness to which an individual business man can carry it by his own individual practice, is conducive, in many ways and to a striking extent, to his own personal advantage, and to the greater efficiency of his subordinates and therefore to the enhanced value of their services.

### **Standardization of Paper.**

Satisfactory filing involves, as has been shown, the use by business men generally, of paper of a uniform or practically uniform size for every uniform purpose. This at the best is not completely possible at present. It is only approximately possible. It will not become completely possible until paper-manufacturers can be brought to agree among themselves upon a very real standardization of the sizes of various kinds of paper. All papers of a named size vary in size.

The variations are due to two causes—lack of uniformity in the size of the paper as originally manufactured, and lack of

uniformity in the practice of cutting the edges of the paper after it has been manufactured. Some papers are extravagantly clipped. When two successive consignments of paper from the same firm of manufacturers prove to vary considerably in size, though bearing the same name, there is evident laxity of management somewhere.

What is wanted is that a fixed size—a specific length and a specific width—shall be determined upon by paper manufacturers as the standard to be worked to by them all as regards every individual recognized variety of paper. This would involve some adaptation of machinery, the cultivation of greater precision of eye and hand on the part of certain workmen, and a closer supervision of certain processes than at present prevail. It is one of the subjects upon which a conference of business men, such as is sometimes called in connection with modern business exhibitions, should be able to offer helpful suggestions. Paper manufacturers would find it pay them to attend to this little matter.

Meanwhile each individual man of business, professional man, or literary, or other worker, can do something by insisting, when he purchases paper for any specific purpose, upon being supplied not only with paper bearing a specific name, but with paper of exactly a specific size. He can to that extent standardize the paper he uses.

### **On Standardizing Generally.**

There are papers which in all businesses need to be filed in addition to correspondence, even in the extended meaning of that term which has been adopted in this chapter. In some businesses there are many kinds of such papers. They affect the filing scheme because they give rise to troublesome questions as to the best kind of appliance for filing them and as to what are the most satisfactory methods of filing them. Difficult some of these questions undoubtedly are. Take the matter of manufacturers' catalogues, price lists, trade circulars, commercial reports, etc. These arrive in every conceivable

variety of size and form. Some are large and bulky; others are almost insignificant in size. Some reach the office flat, others come folded and creased. Some are on thin paper, others on the heaviest and thickest paper manufactured. Absolute uniformity of size and shape in catalogues, price lists, etc., is a matter of difficulty. The mere item of illustrations makes some amount of variation necessary in certain instances. Nothing but a large illustration, necessitating the use of an unusually large sheet of paper, will serve for some purposes. But conceding all that may be urged on this point, there is room for a very considerable amount of uniformity in the size of all these documents. The majority of them could, with advantage to everybody, be of a standardized size and shape. They remain unlike in size largely because nobody has given a thought to the desirability and importance of standardizing them.

The arrangements for filing catalogues, price lists, trade circulars, commercial reports, etc., have necessarily to take into account the prevalent diversity of size and shape of all papers which fall within those descriptions. Rather deep drawers, with movable guides, adapted to either the alphabetical or the numerical system of filing—whichever may be employed generally in the office—are probably the best kind of appliance that can be utilized for preserving such papers so as to be always available for reference immediately they are required. In those drawers the papers will be placed vertically, but not enclosed in a folder. Catalogues, price lists, trade circulars, commercial reports and similar papers are individually of temporary importance. For the most part they soon get out of date, being superseded by new arrivals, which when they reach the office can be substituted for the old, the latter being taken off the file and—unless there is some special reason for preserving them—promptly destroyed.

Firms that advertise extensively experience considerable difficulty and inconvenience by reason of the strange lack of a simple piece of standardization that is so obviously needed

and could so easily be brought about that one wonders why it has remained so long unaccomplished. Advertisement rate-cards are prepared presumably for the purpose of filing by advertisers. They are intended to be kept for reference. They are as a rule permanent, for the large well-established newspapers and magazines seldom revise their scales of charges for advertisements. One would suppose, therefore, that in preparing them and deciding on their size and form, the seekers of advertisements would have regard to this imperative necessity of filing. Yet advertisement rate-cards exhibit the most extraordinary diversities of size and shape—to say nothing of the superfluity of information which some of them contain or of the evident determination in other cases to give as little information on them as possible. For convenience sake they are here described as rate-cards. But they are not all cards: some of them are large sheets of printed paper. Some are folded: others are not.

The business man who advertises must perforce keep his advertisement rate-cards filed separately from all other commercial papers. What sort of drawer shall he provide for the purpose? It is not easy to reply. In some cases it is worth while to copy from the various rate-cards that he receives all the particulars that concern him or his probable requirements. Many rate-cards contain a great deal of information that he will not want to preserve. The copies may be made on cards of a uniform size and kept together in an ordinary narrow drawer such as is used for the popular card-index. Where that course is not adopted a drawer deeper and broader must be provided for the purpose. But it is eminently desirable that pressure should be brought to bear upon the proprietors and business managers of periodicals of all kinds to agree upon a uniform size for the advertisement rate-cards that they issue. It would pay them to do so, as things that are difficult to file are apt to get mislaid, and there can be no doubt that the lack of standardization leads in some cases to a loss of advertisements that would otherwise be obtained.

## **Time-Saving Value and Economy of Standardizing.**

The foregoing comments and illustrations touch the merest fringe of a large subject. Standardization is urged, not from some pedantic attachment to an orderly uniformity, but because it is capable of effecting an enormous saving of time, effort and expense to all concerned. It should appeal powerfully to the entire mercantile community, not solely on the ground that it is able to contribute so largely to increase the efficiency of every filing system and to second the objects of those who have devised and who advocate such systems, but on the further ground that it will simplify a multitude of business processes, this simplification resulting in a considerable reduction of expense as well as in a considerable reduction of the time required.

It is surprising how little the truth of this proposition is realised. It would be easy to cite a hundred examples of the wastefulness of the varied practice that at present prevails. Two instances must suffice. They are worth studying.

Take the matter of cheques. The business of printing cheques is not undertaken by more than a comparatively small proportion of the printers of the kingdom. Cheques are well-known documents : they all serve the same purpose. If there is any commercial document as to which uniformity in size and shape would be possible it is apparently the cheque. Yet everybody who will take the trouble to measure and compare the several sizes and shapes of the cheques received will be astonished at the diversity of them. Two cheques arrived on the same day, one drawn on a London branch of a well-known bank, the other drawn on a provincial branch of the same bank. Both were in precisely the same form, neither of them containing any special or exceptional matter. Yet one was a quarter of an inch longer and nearly an eighth of an inch broader than the other ! A business man stated not long ago that he receives cheques varying from three inches to six inches deep and from seven inches to twelve inches wide. The intermediate sizes are numerous.

Nor is the mere difference of size the only deviation from uniformity. Some order cheques require a payee to sign his name on the back of them ; others require the signature to be written at the foot of the cheque. Some contain a receipt form on the back. Others contain a receipt form at the foot.

Suppose all these differences were got rid of ; suppose every cheque were of an identical size and shape ; suppose all cheques to order had to be signed in the same place—at the foot would be preferable because it could be seen at a glance whether the payee had signed or not, which would mean a vast saving of time to thousands of bank clerks who have to examine great quantities of cheques every day. Suppose those that required the payee's receipt all required it at the same place—the foot of the cheque would for the same reason be more desirable than the back. Would not everybody concerned reap various advantages ? Printers, lithographers and others taking part in the preparation of cheque forms would standardize their machinery and appliances for the purpose. There would be a sensible saving in their case. Business men receiving and dealing with cheques would save time because they would deal with all cheques in exactly the same way. Bankers' clerks would save time in verifying the cheques that pass through their hands. Bankers' collecting clerks would find the arrangement of their cheques for presentation at the bankers' clearing-house or at any bank not represented by that institution rendered far more easy than it is now. Auditors would get through their work with less labour and greater expedition.

The second illustration will appeal specially to business men who advertise. The man who wants his own advertisement presented in his own way has a block or stereo plate prepared specially where an illustration is to form part of the advertisement. He may have paid a large sum for a particularly effective design, and he has incurred the cost of having the block or the stereo plate prepared. But he is immediately confronted with the fact that there is a great diversity in the width of the columns allotted for advertisement purposes in

the principal newspapers. His block will fit some of them. It will fit some awkwardly. Others it will not fit at all. Either he must have fresh blocks specially made or a different type of advertisement framed for the papers whose advertisement columns are too narrow to accommodate his original block, or he must abandon the idea of advertising in them. In very many instances the latter is the course that he adopts, and the newspaper proprietors suffer! Hence it is not surprising to find that a demand is growing up among advertisers for the standardization of the width of the newspaper advertisement columns.

This entire topic of the standardization of commercial papers is a large one. The arguments in favour of standardization are overwhelming. There is really nothing to be said against it. It is practicable. The variety that now exists has no compensating advantage. It has not even the defence available for certain kinds of variety, that it is picturesque. It is the reverse of picturesque. It is awkward, it multiplies trouble, involves unnecessary expense, and is a most fruitful source of wasted time and effort. For the sake of every sound filing system and for the sake of all that every filing system stands for, that variety must disappear. Standardization is inevitable. It will come as soon as business men generally insist that it shall come.

### **Standardized Furniture for Filing.**

The inventor who first hit upon the idea of making furniture used for storage purposes, in sections, projected into the world a new method of manufacture destined to be fruitful in directions which he probably did not anticipate. The plan is generally believed to have found its first embodiment in library furniture. The sectional book-case, the book-case that at the beginning may consist if desired of one shelf only, and may grow horizontally or perpendicularly as its owner's collection of books increases until it numbers as many shelves as are needed to accommodate a large library, is now too familiar to need description here. It "took on" because it



supplied exactly what was wanted. The possessor of books was no longer compelled either to purchase a book-case enormously larger than his immediate necessities dictated, or to put up with additions from time to time in the shape of further book-cases of varying and inharmonious designs and capacities. The "building-up" system suited his accommodation and suited his pocket also.

Now this method appealed to the manufacturers of modern filing furniture. And it has been very generally adopted by them. Even the circumstance that drawers of different widths and different degrees of shallowness are necessary for filing papers of various kinds has been made to contribute to the utility and the artistic effectiveness of the sectional furniture. A nest of shallow drawers for cards flanked on either side with larger, deeper drawers for correspondence, contracts, invoices, catalogues, price lists, trade reports, samples, and whatever else may be the subject of filing, will not only render everything easy of access, but it will be ornamental. And as time goes on and more and more furniture is added to that originally installed, neither its usefulness nor the pleasing character of its appearance will be in any way impaired.

## CHAPTER XVI

### SOME MISCELLANEOUS POINTS

It is proposed in this final chapter to touch very briefly upon a few points on which questions are sometimes asked with reference to the practical use of various modern filing methods. Those who have been accustomed for many years to work in the old traditional way are often keen to detect the weaknesses of newer methods. It is natural that they should look upon these with a critical eye ; and it is natural also that they should assume an attitude of doubt and even suspicion when they find the newer methods pushed and puffed with all the overflowing gush and enthusiasm that so many zealous advocates display. Modern methods are not ideally perfect : it would be miraculous if they were. There are difficulties which crop up in practice ; and advertisers and travellers are apt to "pooh-pooh" objections and to dismiss difficulties in a particularly summary manner. Some of the difficulties raised are, it must be admitted, not very real, or they are difficulties which disappear in practice. No system works itself ; modern methods, like all others, have to be used with brains. When this is done the actual weaknesses of them will be discovered. It will not, however, usually be found a very troublesome matter to adapt any specific filing system in such a way as at all events to minimize the dangers likely to result from the existence of those weaknesses.

One question that troubles some critics greatly is, "How can you obviate the danger of misfiling ?" Let us look at the question from a practical point of view.

#### **Misfiling.**

Misfiling does occur. There are no means of preventing it. It is the fault, not of the system, but of the individual who

works the system. So long as there are human beings, so long as there are such things as headache, fatigue, haste, carelessness, and forgetfulness, mistakes will be made. Papers will get put on the wrong file. Occasionally the most methodical man will blunder in this way. But are the old methods free from the same liability? Is it not a fact that they are more open to it? Is it not notorious that where incoming letters are tied up in bundles a letter will sometimes find its way into a wrong bundle, and that when it is wanted a long hunt has to be made for it? Is it not a fact that sometimes the search for it has to be given up without its being found? Is it not a fact that an office youth indexing a letter-book will sometimes enter the wrong folio against the right name or the right folio against a wrong name? Does not this entail a good deal of trouble when the particular letter which has been mis-indexed is wanted? Is such a thing unknown even to accomplished ledger clerks as accidentally entering a debit on the credit side of an account, or charging an item to the wrong person's account? These and similar mishaps will take place whatever system be adopted; and wherever and whenever they do take place they will occasion trouble and cause regrettable waste of time. The very least that can be said for modern methods is that they are not more liable to the danger than are the older methods, and that their other advantages are all to the good, so that in spite of the liability they are still conspicuously superior to the older methods.

But that is not the whole of the truth. Something more remains to be said. In the first place, the daily use of modern methods of filing does prove in practice to be conducive to the development of methodical habits, and it does therefore as a matter of calm, cool fact tend to diminish the number of ordinary slips and errors to which all methods are more or less liable. Secondly, the employment of guides, tabs, "signals," distinction by means of colour, alphabetical subdivisions and numerical arrangements, all serving to help the clerk to find exactly what he wants and to hit upon the right file with ease and rapidity, must and does tell in favour of

accuracy, and does reduce very materially the danger of misfiling. Thirdly, the special danger to which modern methods are liable, namely, the danger of a folder, a card or a loose sheet being placed out of its proper order, is not serious. With the ordinary guides, tabs, etc., it would soon be noticed that any particular folder was out of its proper place. Cards and loose-sheets being in use daily, the fact that any one of them has been accidentally misplaced will not long escape discovery. A folder filed under the wrong colour or under a wrong geographical heading, or out of its order numerically where a numerical system is employed, or under the wrong letter of the alphabet where the method used is purely alphabetical, will not long remain misfiled. Early detection of the fact that it is out of its proper place is practically certain. The real danger resolves itself into the possibility that owing to momentary carelessness or haste a letter or some other document that is to be filed may accidentally get placed within a wrong folder. The plan recommended in an earlier chapter, of placing the file number on every paper before filing it, and of adding a serial number, seriously diminishes the danger because it necessitates a preliminary reference to the file.

No system is free from the danger of an occasional misfiling, but it can fairly be claimed for modern systems that they reduce the danger of misfiling to a minimum. It is no mere assertion of an enthusiastic advocate for modern filing systems, but the statement of an indubitable fact, absolutely established in practice, that so far as the actual dangers of misfiling are concerned, the balance of advantage is entirely on the side of the modern methods.

### **Cards or Detachable Sheets in Binders.**

The clamour of advertisers and the dogmatic advocacy of rival claimants for rival methods is at times a little embarrassing to the anxious inquirer. Just as there is keen competition between the manufacturers and sellers of furniture and appliances adapted to the vertical system of filing and the manufacturers and sellers of furniture and appliances adapted

to the horizontal system, and just as there is something approaching a war to the death—on paper—between the firms who push alphabetical schemes of filing and those who push numerical schemes; so there is a struggle between the strenuous advocates of cards for all purposes and the advocates of the various “ loose-sheet ” systems with their arrangements for keeping loose-sheets in locked binders. The “ card man ” dwells on the ease and simplicity of merely pulling out a drawer, turning instantly to your card and having before your eye at a moment’s notice the information you happen to require, and he points out the delay involved in taking down a book—for loose-leaves in a locked binder are of course to all intents a book—and turning up the page you want. And the “ loose-sheet man ” will paint a harrowing picture of disaster—a clerk with an empty drawer in his hands and the floor strewn with the cards that have fallen from it, all hopelessly disarranged, and not to be got into order again without a vast amount of trouble and a large expenditure of time. And he will contrast with this picture another—the clerk with two or three collections of “ loose-sheets,” each collection securely fastened in its binder; and he will point out triumphantly that the fall of one of those “ volumes ” would not involve the dispersion or disarrangement of any of its contents, and that the only labour entailed by the accident would be the momentary task of picking up the dropped article. The man who thinks of installing a modern system for his own use will not, if he is wise, allow himself to be alarmed by either of these arguments. They are merely the devices of eager advertisers. Cards do not usually strew the floor; and sheets kept in binders are not always securely fastened together before they are removed. Let him disregard the alleged advantages of one over the other and consider only which of them is better adapted to the special purposes of his business. The underlying idea is identical as regards both of them. They are merely two competing attempts to carry that idea into practice. Sheets are on the whole more easily adaptable than cards in the matter of size. Sheets are usually larger

than cards, though of course cards can be manufactured specially in any size required. Where the entries are likely to be numerous, or where they are generally numerous in relation to each individual transaction, the use of cards may involve employing two or three cards in succession in connection with that one transaction, whereas sheets can be printed with such headings and columns and other matter as may be desired, that will be large enough to include every record which it may be necessary to make in all but very exceptional transactions in the particular business concerned. This is a consideration worth bearing in mind. In such cases the loose or detachable sheet makes for greater compactness and therefore for simplicity, and permits of greater ease and economy of time in consulting it. And there is the feeling that one has not entirely abandoned the old book form of record, for the securely locked binder makes of the collection of records a veritable book.

And then it is claimed that a clerk copying an account or addressing a set of circulars can do so more conveniently from the records in a binder than from a collection of cards. The claim seems extravagant. In one case the card can be readily removed from the collection to copy an account or any other record upon it. In the other case—that of addressing circulars, it is really difficult to see that there is any advantage. It is not usual to address circulars from the headings of ledger accounts. The fact is that these matters are irrelevant. It is not upon trivialities such as these that the decision should be arrived at as to which method shall be adopted in an individual office.

Of course, where an index of names and addresses is required, even when the various other particulars suggested in earlier chapters are added to the card-record, making it available for other purposes beside the mere ascertainment of addresses, the advantage of the card is incontestable. Its dimensions are quite large enough for the purpose ; it is easily kept, easily handled, easily removed when its purpose has been served, and it occupies very little space ; and the card index of names

and addresses may very well be supplemental to the loose-leaf ledger.

Nor is there any conspicuous advantage in the one case over the other in the matter of typing. Loose-leaf records can be typed, and in this respect they are enormously superior to the old-fashioned bound volumes. But the same thing is true of cards. The certain and absolute legibility and neatness of the typed record have long ago led to the now very general practice of typing even brief records on cards where the card system is employed. Contrast the result with that attained where one card is written by one clerk, the next filled up by a principal, the third penned by a second clerk, and so on, each of the writers scribbling hastily, and probably two out of every three of them not writing very distinctly; and notice the difficulty and the annoyance felt by the person who consults a set of written records and is baffled by the doubtful penmanship of one card or the illegibility of another! Can there be any question that the practice of typing, even where the record is so short that it takes longer to type it than to write it, is preferable? But all that can be said as to the greater convenience of the typed record on a loose-leaf can be said with equal force and conclusiveness of the typed record on a card.

Nor is there any greater danger in the one case than in the other of the loss or falsification or the improper abstraction of records. The binders can and should be kept locked; the cards can and should be kept in their place by the rod which is one of the fixtures of a card-filing drawer. All cabinets or cases in which either cards or binders containing loose-sheets are kept, should be carefully locked at night. There is no more difficulty in doing this in the one case than in the other.

There is hardly a point of difficulty that has not been thought out and provided for in the various systems now on the market; and the difficulties that attach to the "loose-leaf" methods have been thought out just as fully and provided against just as carefully as those which experience has brought to light where the card systems are employed. The

one element that no system can itself protect an employer against is the human element. The system has to be worked by the employer or by his subordinates, or by both. It must be worked intelligently. Neither a loose-leaf system nor a card system can do away with this necessity. There are certain human weaknesses which have to be overcome. And this leads us to a question of office discipline. All modern systems do in fact bring us into unavoidable contact with that problem. Experience proves that where human workers are concerned precautions are indispensable; and experience of loose-leaf systems and of card systems alike proves also that certain precautions of a specific character are useful.

Or take the topic of what is sometimes called "dead matter." It is the chief merit of the loose-leaf book over the old-fashioned bound volume with irremovable pages, that there need be no blank pages in use to swell the bulk of the thing, and that pages that are no longer required can be instantly removed and placed in transfer cases until the time comes for their destruction. The card with a "dead record" can be removed as easily as the loose-sheet. There is no more need to cumber the card-drawer with records that are no longer needed than there is to cumber the loose-leaf binder with similar records.

And so we come back to the solitary important point of difference, the fact that where, as a rule, a large number of entries have to be made in relation to each transaction or in relation to the transactions of each customer the loose-sheet is, generally speaking, preferable to the card. For ledger accounts in some businesses, this is unquestionably the case: but it is not so in all businesses.

### **Precautions.**

Modern filing systems will get out of order unless proper precautions are taken to prevent disorder. In this respect they do not differ materially from any of the older systems. It is a mistake to suppose that modern systems are liable to greater dangers of disorder than are the methods of the past.



They are liable to different dangers : and the different dangers necessitate different precautions. Wherever the actual dangers are completely understood—and any intelligent man who has to work any one of the modern systems and who has his wits about him, and has cultivated the indispensable power of observing and of reflecting upon the outcome of his observation, will very quickly come to see what the real dangers are—they can be very easily provided against. Briefly the greatest, the most serious danger of all, is the unmethodical man. He must be kept in a subordinate position, a position in which he is quite powerless to disturb the equilibrium or to hamper the smooth working of the system—until he has developed methodical habits. Whatever the business may be and whatever special kinds of work it may entail, the unmethodical man, if he is employed at all, must be kept under constant supervision. The man who proves incurably unmethodical will have to be discharged sooner or later or assigned to some department in which he can do no mischief. The members of the staff should individually all be equal to the system, and able to adapt themselves to it. They must conduct their respective operations in such a way as to conduce to the smooth working of the system. This does not mean that they are to become slaves of the system. Rather it means that they are to become its masters. Unless they master it thoroughly they cannot control it ; and unless they are methodical they will never control it.

Now to turn from generalities to specific precautions. Rules may be framed that will help subordinates along the right road, rules that will tend to correct even a strong natural tendency to that carelessness which, if unchecked, inevitably culminates in disorder. The following are rules that should be inflexibly enforced. It would not be a bad plan to have them printed and posted up in a prominent position in every filing department. If they are to be enforced it must be the business and the duty of some one particular person to see that they are enforced. The slightest breach of them should

call forth a reprimand. The reprimand should be strong and emphatic. Repeated breaches should be followed by dismissal. To tolerate repeated breaches of a rule made to ensure the smooth and satisfactory working of the business routine is to set up a sort of "dry rot."

**RULES.**—(1) Every letter and telegram received is to be filed on the day upon which the reply to it is written, or, if it needs no reply, on the day of its receipt.

(2) Every copy made to be retained of a letter or telegram dispatched from the office is to be filed on the day on which the letter is dispatched.

(3) Every letter or other paper withdrawn from a file is to be returned to its proper place on the file on the same day.

(4) All loose-sheets withdrawn from a binder and all cards withdrawn from a card-drawer are to be returned to the binder or the drawer, as the case may be, immediately the purpose for which they have so been withdrawn has been served.

These rules rigidly enforced will obviate most of the real dangers to which modern systems are liable.

But there are other precautions which can be taken. For instance, when a card is withdrawn for a temporary purpose, that fact may be made apparent by inserting in its place a blank card of a special colour—a colour unlike that of any of the other cards. The inserted card may be a trifle larger than the others so that it will be conspicuous among the rest and will thus compel attention to the fact that there is a card outstanding which has to be returned. Incidentally it will help the filing clerk to find instantly and without searching for it the place to which the withdrawn card is to be returned. A similar device can be adopted when a folder is removed from a file or a "loose-sheet" is removed from a binder. Where any numerical or partly numerical system is in use, the practice of placing the relevant number upon every letter or document as well as upon every folder or loose-sheet or

upon the guides, tabs, signals, etc., employed will help to make the filing so easy that there will never grow up that feeling of irksomeness which leads to shirking and breeds carelessness and disorder.

The writer remembers seeing in an office in which the card system was extensively in use and in which several modern calculating machines and other expensive modern devices were employed, a curious practice in vogue with regard to cards temporarily withdrawn. An ordinary book was kept as a register of withdrawn cards; and the rule of the office was that whenever a card was withdrawn the clerk who had charge of the cards, should enter in that book-register the particulars of the card, the name of the member of the staff to whom it had been handed, for what purpose it was wanted, the date of its withdrawal, and the date of its return. On no account was a card to be withdrawn without these details being entered in the book. When a card was returned the entry relating to it was struck through in ink. Entries not so struck through were intended to put the filing clerk on his guard, to serve as warnings that there were cards which he was to get back from the persons to whom they had been handed. A vigilant superintendent of the filing-room could with this help trace every card and insist upon its return within a reasonable interval after its withdrawal. But the book hardly seemed appropriate. A separate drawer labelled "cards withdrawn" might have been set apart for cards bearing the same entries as were there written in a book. Or a separate drawer would have been unnecessary, for the cards with this projecting label might be equally well placed in the "miscellaneous" drawer which forms part of the requirements of so many offices.

The advantage of the cards over the book would be that the former could be arranged in any order desired, whereas the entries in the book would necessarily follow a chronological order, and as some cards would be returned more promptly than others, there would be spaces and sometimes several pages between one "live" entry and the next. The book would

always contain more dead matter than live matter ; whereas the card-record of withdrawn cards would contain none.

This is mentioned as an alternative plan to that previously suggested of inserting a card of a particular colour to indicate the fact of the withdrawal of a card and the whereabouts of the place to which it is to be returned. In some businesses a record of every temporarily withdrawn card is important. It may be equally necessary in some instances where the "loose-leaf" system is employed. In that case it would be extravagant to use an entire sheet for the purpose. A little book containing detachable slips would serve the purpose effectually. The necessary memoranda can be made on the slips, one of them being used for each memorandum. When the loose-sheet that has been withdrawn is returned the relevant slip can be at once detached and destroyed.

The cards or slips can, of course, be printed with such headings as will reduce to a minimum the quantity of writing to be done and the time occupied in making the necessary memorandum on the occasion of the withdrawal of a card or a loose-sheet.

### **Custody of Key.**

As the successful working of the system depends upon the successful organisation of the staff, so the successful working of the staff depends upon the due allocation of personal responsibility among the members of the staff. From the principal downwards the duties must be fixed. The records of the business, from the list of names and addresses to the correspondence and so on to the ledger accounts, are matters of great importance. The cabinets and drawers containing them should be kept locked when not in use. The loose-leaf books should be kept locked. And it should be the duty of some one selected person to attend to the locking of them. He should never allow the key to leave his possession. As regards accounts kept in a loose-leaf ledger it is usually recommended that the principal should himself retain the key. This is not always necessary or desirable. But the key should not be indiscriminately accessible to every member of the staff.

### **Transfer Cases, Books and Drawers.**

Modern methods of dealing with office records claim and are intended to provide that by means of their employment no records that are in use need be hampered with the presence of "dead matter." Papers not required for current use are placed in a transfer case and relegated to a place by themselves. Even the card index can be always kept alive by the removal of the cards relating to persons with whom the firm has ceased to deal. The ledger contains none but "live" accounts, and is never any bulkier than the actual requirements of the business compel it to be.

Transfer cases which suit all or any of the various systems are procurable. One firm specializes in transfer drawers for cards. Another will supply special trays and cabinets for the various transfer files. It is not necessary to describe them in detail here. To those who are new to their use a personal inspection of the appliances at the warehouse of any of the suppliers of them will convey more information than can be gathered from any printed explanation.

Some definite scheme is essential for dealing with the whole matter of transfers. There are various methods in vogue. Where correspondence is filed separately, the files being kept in numerical order, there are conspicuous advantages in the plan of clearing out all the files on 31st December in each year, placing their contents in numerical order in transfer cases and labelling the latter after the following fashion: "Correspondence Nos. 1 to —: 19..." Where this method is adopted the whole of the correspondence for a single year is available at a moment's notice. It will sometimes be necessary to consult the correspondence of a past year to deal with current correspondence; and it may sometimes be necessary therefore to refer to the contents of a transfer case as well as those of a current folder in relation to business which begins in one year and continues into another. The little extra trouble which this will cause—and it should be slight—will, however, be more than compensated for by the absolute certainty as to the whereabouts of the papers.

It is essential to the smooth working of a numerical scheme of filing that the whole of the correspondence for the year shall remain in the current set of files until the close of the year ; that there shall be no removal during the year because a customer has died or withdrawn his business, or because the transaction with him is terminated. It is sought sometimes to make transfers during the year of " dead matter " by placing it in a temporary transfer case and dealing with the contents of that case at the end of the year when the other transfers are made. In exceptional instances there may be some advantage in that course : but as a rule it represents an unnecessary complication. If the transfers are to be made annually it is better not to make any of them piecemeal during the year.

Where the records are filed alphabetically, and there is no numerical scheme in use, a similar method can be applied.

An alternative plan, where an alphabetic scheme of filing is adopted, is to keep all correspondence and other matter in its " current " folder so long as the transaction to which it relates is proceeding, and when it has reached its termination, to remove it and place it in a transfer case. In some businesses this method is preferable. It is impossible here to discuss the point in detail. The important thing is to have a plan that seems suitable to your business and to adhere rigidly to that plan. It is bad to use one method on some occasions and for some purposes, and another on other occasions and for other purposes. That way lies confusion. It involves difficulties in dealing with the staff as well as with the records. Still worse is it to fail to recognize the importance of getting old matter out of the way, at least once a year, and of doing this systematically and according to a well-thought-out plan.

### **Destruction of Dead Matter.**

There comes a time when the retention of papers that once were useful is no longer necessary. This is the time for destruction. " I have kept every letter I have received for the last

twenty-five years," said a man to the present writer not long ago ; and he added proudly, " I can put my hand on any one of them at a minute's notice." The reflection was unavoidable that he must have accumulated a great mass of absolutely useless matter. Most of us realize the advantage of the daily use of the waste-paper basket. Modern filing systems do not diminish the necessity or the advantages of that excellent receptacle of the unwanted. It is symbolical of much more than its immediate purpose. Business men have to keep correspondence and other business records for a considerable time. Some firms make it a rule, with an eye to the statute of limitations, to keep papers for six years and then to destroy them. Others keep them for a longer period. But some definite decision should be come to on the subject. Correspondence and business records are not kept for the mere sake of keeping them. They are kept because it may be necessary to refer to them subsequently. As soon as that possibility has disappeared, they may be destroyed. Their retention when it has become no longer necessary, means that the available office space is being wasted.

This matter should not be left to chance. There should be a regular fixed stocktaking day once a year. Stocktaking is usually a time of discomfort ; most workers would shirk it if they could. Once a year on the fixed day all the old correspondence and office records should be gone through and everything that is clearly obsolete should be destroyed or disposed of for destruction. This is the ultimate goal to which the use of all filing systems should lead. Those systems should make everything immediately accessible while it is wanted ; they should make it easily accessible so long as there is a probability of its being wanted for the purposes of the business ; and they should provide for its disappearance when all the purposes for which it has been previously filed and preserved have been completely served.





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